National Aeronautics and Space Administration

SATERN

System for Administration, Training, and Educational Resources for NASA

Scheduling Management

Classroom Guide

(Version 5.8 SP5)

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For SATERN v 5.8 SP5

Last Modified 04/27/2010

From the NASA SATERN Program Office:

All SATERN administrator training materials must be used alongside the SATERN Rules and Process Guide for administrators. The Guide identifies areas where SATERN functionality cannot enforce the Agency-defined usage of the system at NASA and provide guidance to enable administrator compliance with Agency-defined methods and procedures.

Table of Contents

Course Introduction

Through lecture, activities, and hands-on computer lab work, this course teaches you the concepts and terminology associated with scheduling instructor-led items in SATERN. You will gain basic, hands-on experience using the SATERN system functions to schedule items and assign resources.

OBJECTIVES

Upon completion of this course, you will be able to:

- Describe the process for creating a scheduled offering
- Create a scheduled offering
- Assign resources to a segment within a scheduled offering
- Register learners for a scheduled offering
- Reserve slots in a scheduled offering
- Record learning events
- Copy scheduled offerings

TARGET AUDIENCE

This training is intended for SATERN administrators responsible for creating and modifying scheduled offerings and classes in SATERN.

USING THIS GUIDE

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

Icon	Definition
	Activity: Indicates an activity for you to complete that helps reinforce the information you just learned.
	Note or **Tip**: Indicates additional information that is related to the information presented. It also provides helpful hints and tips or other guidance that further explains the information it accompanies.
	Lab: Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.
	Warning: Warns against particular actions, or that a particular condition might indicate a problem.

ADDITIONAL RESOURCES

There are a number of additional resources that can provide you more information about the SATERN system. These resources include:

- Online SATERN system help
- Task-specific job aids

Lesson 1: Scheduled Offerings

After creating instructor-led/blended items, we need to schedule them for a specific date, time, and location in order to track learner registration. Scheduled offerings are scheduled items used to manage resources, learner registration, and course duration.

Objectives

Upon completion of this lesson, you will be able to:

- Define scheduled offering terminology
- Create a scheduled offering
- Describe the purpose of the main tabs within a scheduled offering

Scheduling Overview

Scheduling management is the process of creating scheduled offerings for instructor-led/blended items or schedule blocks. This course focuses on scheduling items within SATERN. Creating a scheduled offering places an instance of the item on the calendar, allows resources to be associated with it, and allows learners to be registered into it. Learners are registered into scheduled offerings by administrators, supervisor, or themselves. The process also triggers email notifications that are sent to participants, supervisors, instructors, and contacts associated with the offering.

Scheduling Terminology

Table 1 presents some terms and definitions related to scheduling in SATERN.

Table 1. Scheduling Terms and Definitions

Term	Definition
Class	A group of learners who are tracked as a group and perhaps complete a series of scheduled training requirements.
Custom Resources	Resources not categorized intended to track training cost (e.g., catering or parking fees).
Equipment	Reusable training objects (e.g., VCR, TV, video cameras, or LCD).
Facility	A building where training takes place (e.g., Headquarters).
Instructor	A person who will instruct or facilitate a specific portion of the scheduled offering.
Location	A space or room within facility (e.g., a classroom, computer lab).
Materials	Consumable training objects (e.g., notepads, markers, or specific training guides).
Resources	Assets that are assigned and reserved to a segment within a scheduled offering.
Schedule Block	A schedule block prevents resources from being scheduled into another offering during a given time. Schedule blocks are often used to make learners and resources unavailable on the learning calendar, such as when equipment is undergoing maintenance, or a learner is out of the office for an extended period of time.
Scheduled Offering	An instructor-led or blended learning item with a scheduled date and time.
Segment	A block of instruction within a scheduled offering. Scheduled offerings must contain at least one segment, but can have multiple segments. Segments are unit of time used primarily for resource management.

CREATING SCHEDULED OFFERING

When an admin creates a new scheduled offering, he/she must select the item to schedule along with a start date and time. SATERN creates the segments of the scheduled offering using the information from the Delivery Data tab of the selected item (Figure 1).

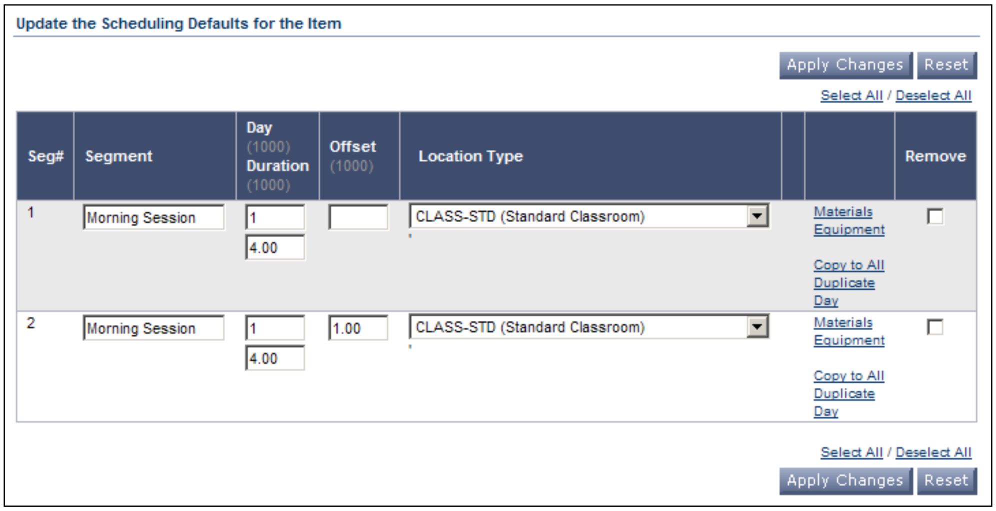

Figure 1. Delivery Data Tab: Item Record

Each scheduled offering is comprised of segments. A segment is a block of instruction within a scheduled offering that can have resources assigned to it. Scheduled offerings must contain at least one segment. Once the scheduled offering is created, an authorized admin can change the segment defaults.

Like items, scheduled offerings are made available to learners via catalogs. By default, new scheduled offerings are automatically added to any catalogs that contain the instructor-led/blended item. Administrators may remove scheduled offerings from certain catalogs, thereby making specific scheduled offerings available to some learners but not others.

Start Dates, Start Times, and Time Zones

When scheduling an item, administrators must specify a start date, start time, and time zone of delivery.

The admin may also decide to check the **Show in this Time Zone** checkbox, if he/she wants the start and end times of each segment to be displayed in a specific time zone (e.g. EST, MST, PST, or CST).

This is useful if learners are attending the offering from different time zones (Figure 2). This way, learners who are traveling to the training see the start time of the offering where the training site is located (8:00 AM EST for training occurring in Washington D.C.).

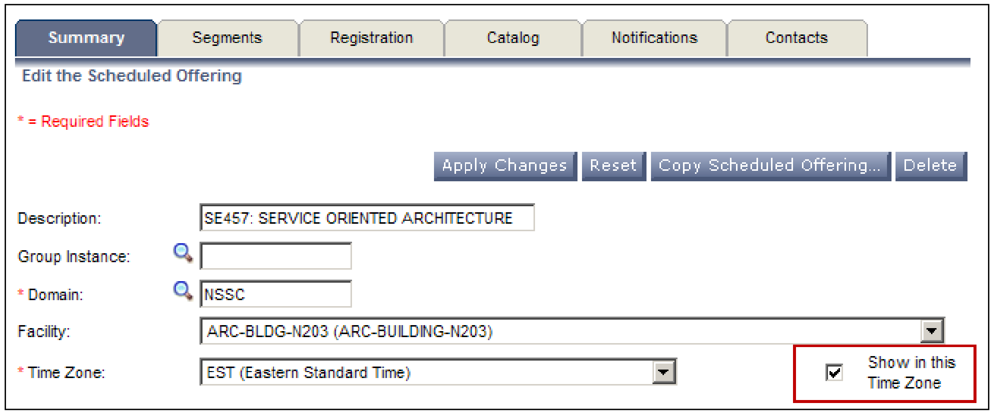

Figure 2. Scheduled Offering Time Zone Setting

If the checkbox is not selected, all times are recalculated and displayed to the admin/learners in his/her time zone (set in preferences).

Note: *The admin should leave this checkbox unchecked for Virtual Learning System (VLS) scheduled offerings, as it will be beneficial for everyone to see the times in his/her own time zones.*

Note the **Always display Scheduled Offerings in this Time Zone** checkbox, located under the Preferences tab of both the learner and admin records, overrides the **Show in this Time Zone** checkbox of the scheduled offering. This means that an admin or learner sees all scheduled offerings in his/her own time zone – regardless of the setting for a particular scheduled offering.

CREATING SCHEDULED OFFERINGS

Administrators can create scheduled offerings from four locations within SATERN:

- Home Page Quick Links (**Add New Scheduled Offering**)

- Quick Links drop-down menu in top menu frame
- Item record (**Schedule** button on Summary or Delivery Data tabs)
- **Learning > Scheduled Offering** (**Add New** link)

All four locations run a tool that provides the admin with a calendar preview and wizard interface for scheduling items (or schedule blocks) (Figure 3).

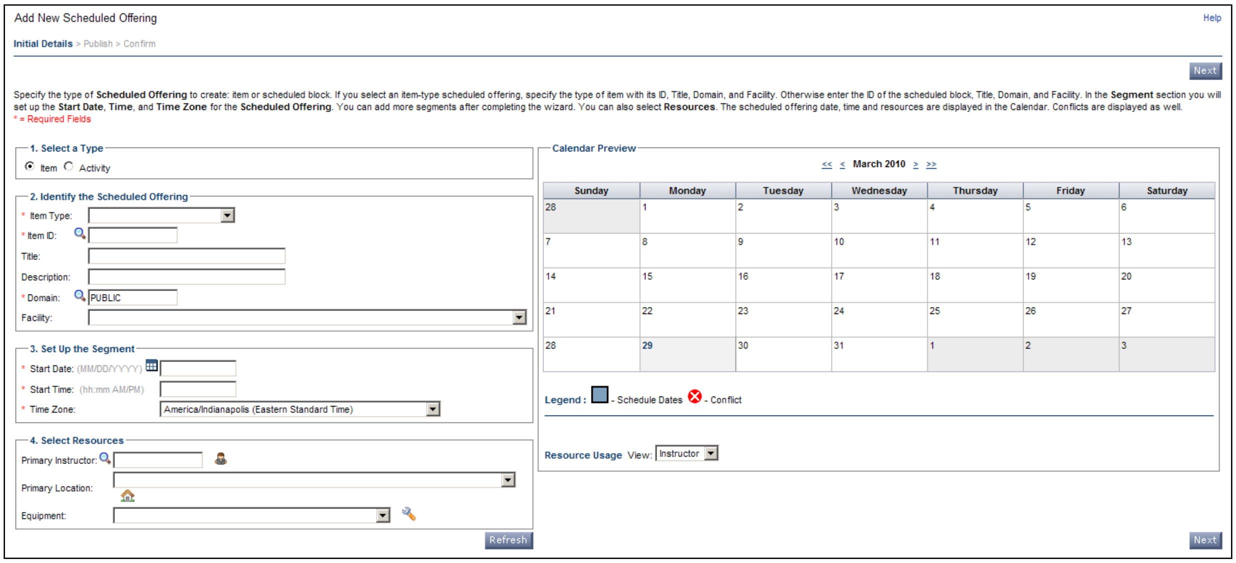

Figure 3. Scheduling Quick Link View

From this tool, an admin may select default instructor, location, and equipment resources for all segments of the scheduled offering. The calendar view shows possible resource conflicts.

NASA Business Rule

Follow the process listed below when an employee wishes to attend training hosted by another center.

To maximize civil service employee enrollment in onsite training, centers frequently open their courses to employees at other centers. In order to allow learners to use the self-registration features in SATERN to request training at centers other than their home center, a specific process must be followed to allow administrators to efficiently manage enrollment.

The detailed flow for the Other Center Training process will be detailed in an upcoming job aid on the SATERN Information Web site (https://saterninfo.nasa.gov/ > Resources > For SATERN Administrators > Job Aids).

However, there are two rules that, when used together, support the process for Other Center Training. The first is to make mandatory the use of a center prefix for the Facility Description field.

NASA Business Rule

Administrators shall add the center prefix to all center facility Description fields.

The second rule is to use a four-step approval process that has been created specifically to address the Other Center Training scenario with the last step in the chain being the Host Center Training Office role.

NASA Business Rule

Administrators shall use the four-step Supervisor/Training Coordinator/Training Office/Center-specific Host Center Training Office (HCTO) approval process whenever they wish to make a course available to learners from other centers. When the Center-Specific HCTO approval role is assigned, the admin shall assign the **NASA** control domain to ensure the approver reviews requests from learners at all NASA centers.

Lab 1. Using the Scheduling Quick Link

Step

1. From the Quick Links drop-down menu, select **Add New Scheduled Offering**.

2. Select the **Item** radio button in the *Select a Type* section.

3. Click the **Select Item Type** icon search for and select the item to schedule.

Note: *If you schedule an online item, its classification changes to* Blended*.*

4. Enter a description for this scheduled offering.

5. Specify a domain for the new record.

6. Select a facility from the **Facility** drop-down menu.

Note: *The calendar preview refreshes to display the chosen facility's utilization.*

7. Select a start date, start time, and time zone.

Note: *The calendar preview refreshes to display the selected start date.*

8. If applicable, select resources associated with the scheduled offering: instructor, location, and equipment.

Note: *Alerts are displayed if the instructor selected is not authorized to teach the item, and if there are any conflicts.*

9. Click **Next**.

10. If there are any warnings, you will see the Warning Details screen. Click **Yes** to continue.

11. Click **Next** to proceed.

Note: *By default, this scheduled offering is added to the catalogs in which the item is listed, making it visible and possibly available for learners to self register. You may remove the scheduled offering from any or all of these catalogs.*

12. Click **Submit** on the confirmation screen.

13. The scheduled offering record is displayed, allowing you to make further configurations.

SCHEDULED OFFERING RECORD: MAIN TABS

The scheduled offering record is organized into functional areas by tabs. These tabs contain fundamental information regarding the scheduled offering. Some tabs may be inaccessible (grayed out) depending on your role in SATERN.

This section focuses on the main scheduled offering record tabs, specifically the Summary, Segments, Registration, Catalog, Contacts, Notifications, and Custom Fields tabs, and describes some of the attributes found on these tabs.

Summary Tab

You can use the Summary tab of the selected scheduled offering record to update the basic attributes of the record. Some of these attributes include, for example, its description, domain, facility, etc. You can also update registration settings at the bottom of the screen (Figure 4).

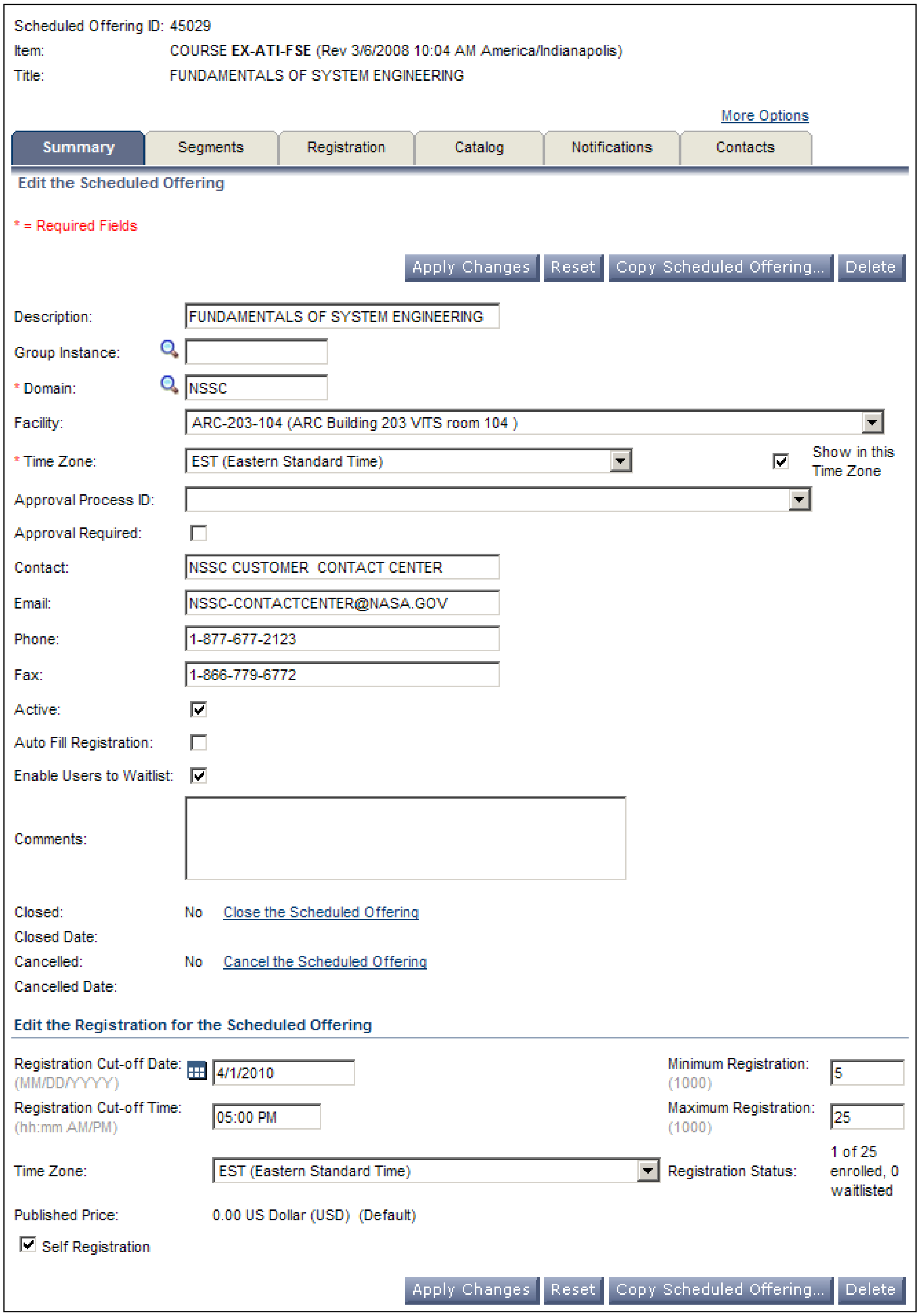

Figure 4. Summary Tab: Scheduled Offering Record

Table 2 provides the fields found on the scheduled offering record Summary tab, a description of each field, and whether SATERN displays the field to learners. A + indicates a NASA required field; a * indicates a system required field.

Table 2. Scheduled Offering Record: Summary Tab Fields

Field	Description	Displays to Learner
Description	Additional information about the scheduled offering for learners. (*This is not a required field, however it is highly recommended*.)	X
Group Instance	A method to group scheduling offerings for reports.	
Domain*	Indicates admin ownership of the scheduled offering (e.g., HR, IT, etc.).	
Facility +	The building where the scheduled offering takes place.	X
Time Zone	Indicates the time zone of the scheduled offering.	X
Show in this Time Zone	Displays the scheduled offering in the time zone specified above to learners and admin if they do **not** have *Always Display Offerings in this Time Zone* checked.	
Approval Process ID + (when required)	Indicates a default approval process (if applicable) that a learner must complete before being able to complete the self-registration process.	
Approval Required + (when required)	This checkbox triggers the approval process entered in the *Approval Process ID* field.	
Contact, Email, Phone, Fax +	Indicates the contact information of the individual responsible for the scheduled offering.	X
Active	This checkbox is used to indicate whether a scheduled offering is active and displays in the learner catalogs.	
Auto Fill Registration	Sets the default for scheduled offerings, so that learners are automatically moved from the waitlist to registration slots that open up when previously registered learners withdraw.	
Enable Learner Requests	Selecting this checkbox enables the **Request Schedule** button to be visible to learners.	X

Field	Description	Displays to Learner
Enable Learners to Waitlist	Selecting this checkbox indicates that the system will allow learners to be waitlisted for this item. If you select the *Auto Fill Registration* checkbox, waitlisted learners automatically replace learners who are withdrawn from the scheduled offering.	X
Comments	This field is for admin informational purposes only.	
Closed	If closed, the scheduled offering is over, learner registration cannot be changed, and the admin recorded cost (see appendix for more information).	
Cancelled	If cancelled, learner registration cannot be changed, and the admin recorded cost (covered in more detail in the Registration lesson).	
Registration Cut-Off Date/Time + (when required)	The last date and time when a learner can change his/her registration status (e.g., register or withdraw).	X
Time Zone	The time zone of the *Registration Cut-Off Time*.	X
Published Price	The internal price of the scheduled offering (learners see catalog price).	
Self Registration	Displays the **Registration** button to learners so they can register for the scheduled offering.	X
Minimum Registration	The minimum number of learners needed to hold the request schedule process. This information carries over to the scheduled offering record.	
Maximum Registration	The maximum number of learners allowed in the scheduled offering. Check *Enable Learners to Waitlist* for SATERN to place learners who exceed the maximum on the waitlist.	X
Registration Status	The number of learners registered and waitlisted.	X

Segments Tab

Scheduled offerings are divided into segments for purposes of resource allocation. A scheduled offering must have at least one segment. An admin can add additional segments or modify the date and time information in existing segments. Additionally, resources can be added to segments from this tab (Figure 5).

Note: *Assigning resources is explained in more detail in the next lesson.*

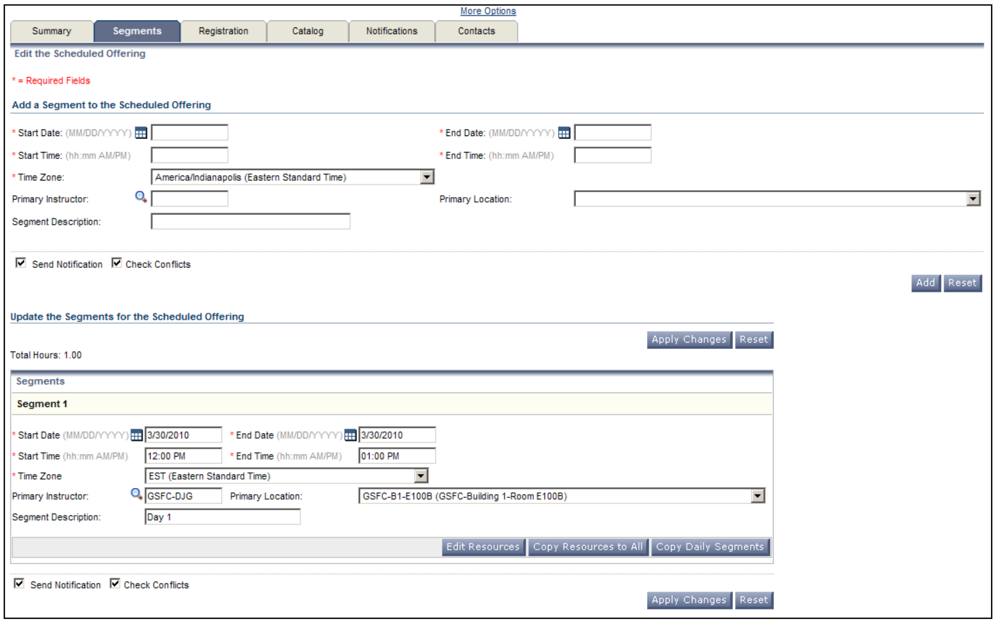

Figure 5. Segments Tab: Scheduled Offering Record

Registration Tab

The Registration tab (Figure 6) allows admins to:

- Register learners for the scheduled offering
- Send e-mail notifications to the learner, his/her supervisor, the instructor, and the designated contacts
- Add slots (seats for an organization) to the scheduled offering

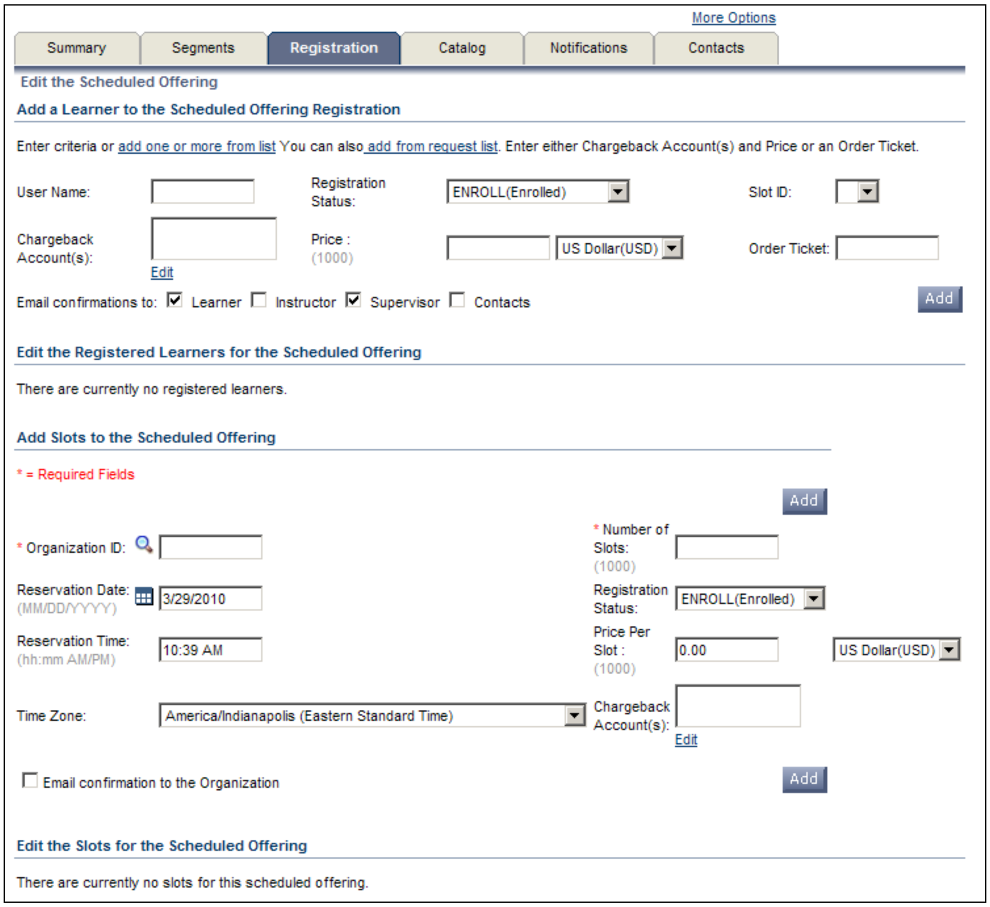

Figure 6. Registration Tab: Scheduled Offering Record

Catalogs Tab

The Catalogs tab allows an admin to determine which learners and supervisors can access the scheduled offering for self-registration. When an item-based scheduled offering is created, it is added to the catalog or catalogs in which the item is currently located.

An admin may decide not to permit learners or supervisors access to the specific scheduled offering by removing all the catalogs from this tab.

It may be necessary to remove one or more catalogs from this tab to restrict access to particular learners. If removed, a catalog may be returned to this tab; however, a scheduled offering may never be placed into a different catalog than that of the item on which it is based (Figure 7).

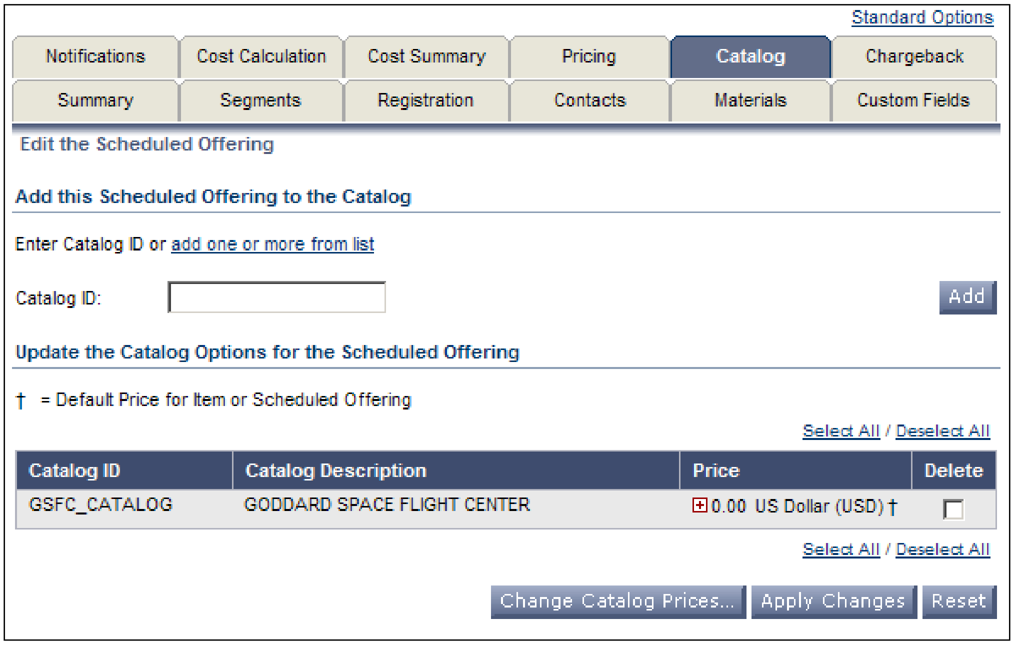

Figure 7. Catalog Tab: Scheduled Offering Record

Contacts Tab

The Contacts tab allows admins to identify people who should or want to be notified about registrations for this specific scheduled offering. You can use either an instructor or learner ID. The selected records must have an e-mail address in the record. When the **Other** checkbox is checked on the Registration tab when modifying the segment information or registration statuses of learners, all contacts associated to this scheduled offering receive a notification (Figure 8).

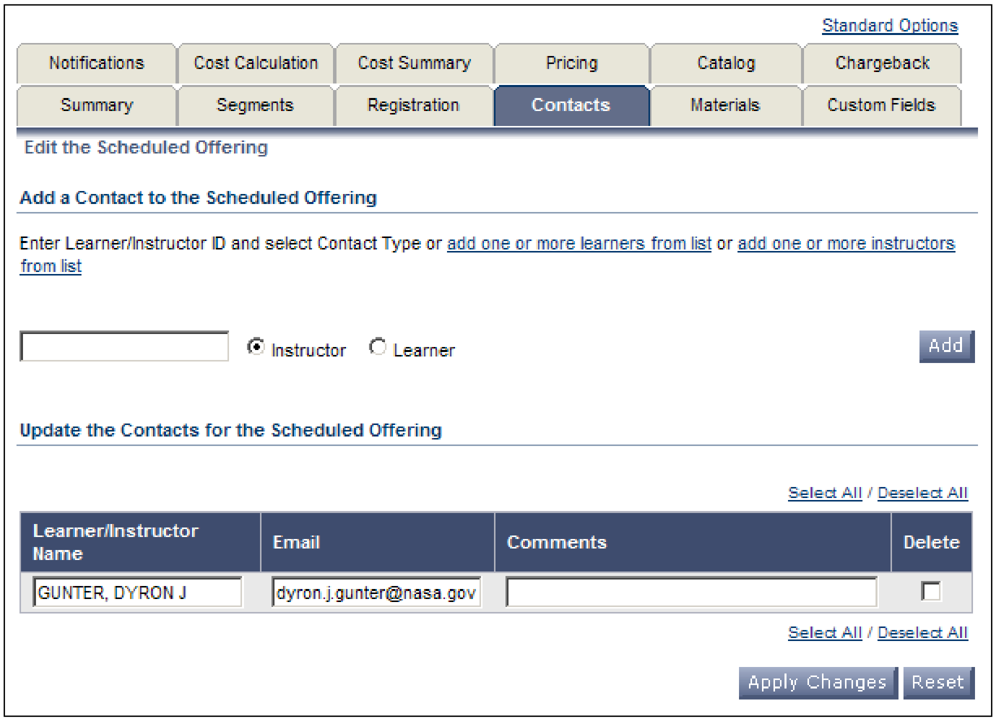

Figure 8. Contacts Tab: Scheduled Offering Record

Notifications Tab

The Notifications tab allows admins to create a specific message or attach a file to registration status e-mails for this specific scheduled offering. If the scheduled offering notification is not modified, the item notification defaults are sent to learners, instructors, supervisors, and contacts, if these checkboxes are checked. Additional messages maybe added to the notification template simply by adding the desired free text; however, if this is added to the scheduled offering notification the additional message would only pertain to that offering. If the message is added to the item, the additional information is provided every time the item is scheduled (Figure 9).

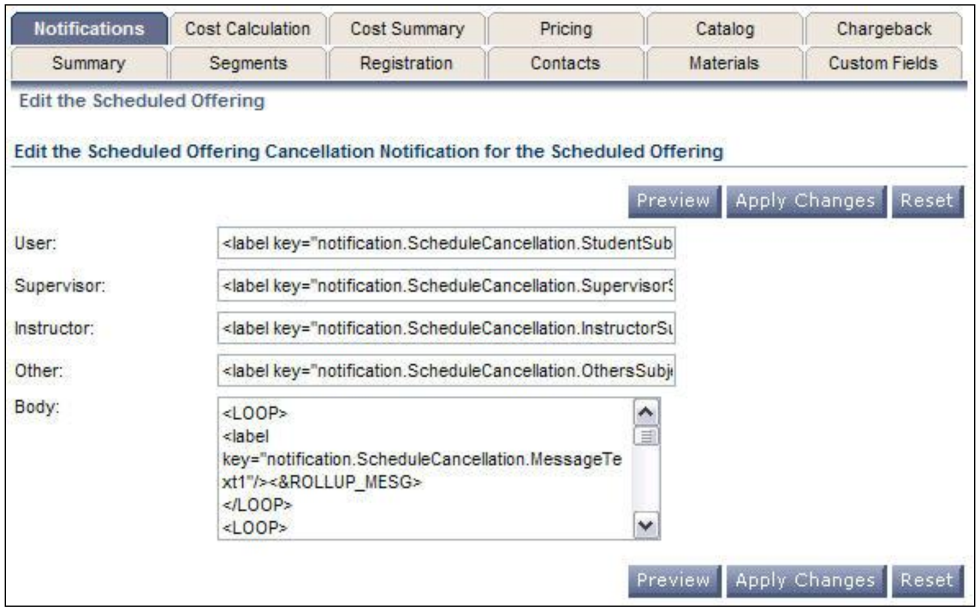

Figure 9. Notifications Tab: Scheduled Offering Record

Lab 2. Modify an Offering Notification

Step

1. Click the **Notifications** tab.

2. Scroll down to the *Edit the Registration Notification for the Scheduled Offering* section.

3. In the body of the message, add the following text:

   Please bring a Photo ID and notepad to class.

4. Click **Apply Changes**.

Custom Fields Tab

The Custom Fields tab allows NASA to capture information that SATERN does not provide a space for “out of the box.” The custom fields can be referenced (pre-populated list) or non-referenced (free text field). Custom fields in the scheduled offering are copied from the item when the scheduled offering is added. The exception is the Metrics That Matter (MTM) field which does not exist at the scheduled offering level. The scheduled offering custom fields in SATERN include those shown in Figure 10.

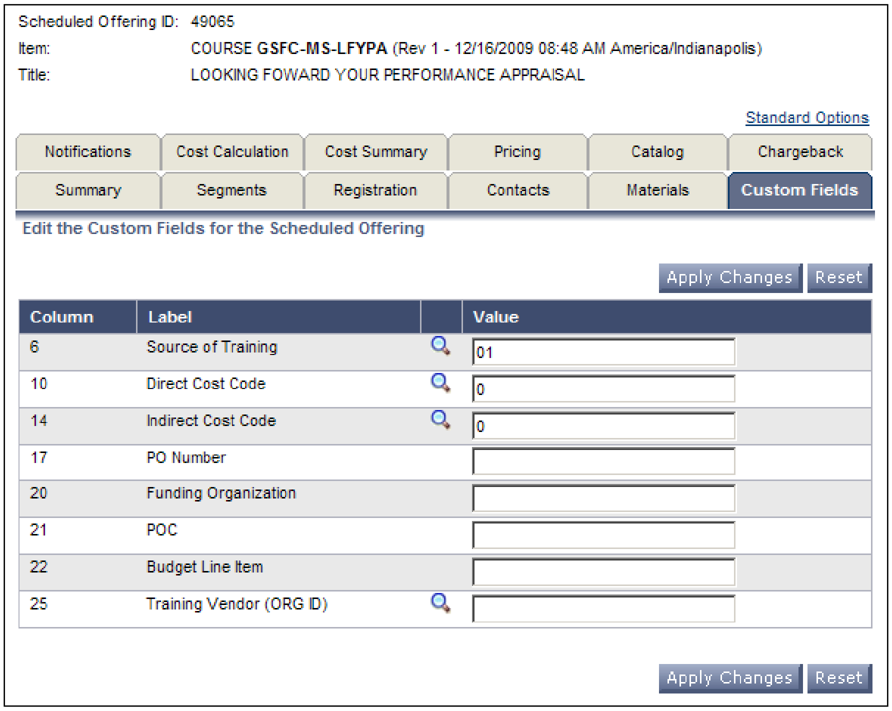

Figure 10. Scheduled Offering Custom Fields Tab

Table 3 presents the SATERN scheduled offering custom fields.

Table 3. Scheduled Offering Custom Fields

Label	Col #	Referenced	Required
Source of Training	6	Yes	X
Direct Cost Code	10	Yes	X
Indirect Cost Code	14	Yes	X

Label	Col #	Referenced	Required
PO Number	17	No	
Funding Org	20	No	
POC	21	No	
Budget Line Item	22	No	
Training Vendor (ORG ID)	25	Yes	X

SATERN Mandatory Fields For Scheduled Offerings

Table 4 presents the SATERN Mandatory Scheduled Offering fields and the location of the field by tab.

Table 4. Scheduled Offering Mandatory Fields

Location (Tab)	Field
Summary Tab	Facility ID
	Approval Process ID – Only if approval is required
	Approval Required – Only if Approval Process ID is populated
	Contact
	Email
	Phone
	Fax
Segments Tab	Primary Instructor - Only if using MTM
	Location
Catalogs	Related Catalog(s) – Only if Scheduled Offering will go into a Catalog
Custom Fields – Refer to Appendix C: Acceptable Code for Custom Fields for Data Definition Table	Source of Training
	Direct Cost Code
	Indirect Cost Code
	Training Vendor

Scheduled Offerings for Courses Evaluated Using Metrics That Matter (MTM)

With the interface of SATERN to the Metrics that Matter (MTM) evaluation tool, guidance for SATERN administrators is needed to outline the necessary fields as well as timing for completion. Learner information will be passed from SATERN to MTM on a nightly basis for all classes that are closed out in SATERN. For guidance regarding which courses should be evaluated using MTM, refer to the Agency Evaluation Guidelines.

NASA Business Rule

If a scheduled offering will be evaluated using MTM, SATERN administrators shall:

- Indicate that MTM evaluation is required by selecting **Y** in the MTM custom field in the item.
- Ensure that at a minimum, a primary instructor and facility ID are assigned to the scheduled offering.

Note: *Multiple instructors can be assigned in segments.*

- In the instructor record, ensure the following required fields are entered:
  - Instructor(s) name
  - Instructor(s) e-mail
- Inactivate the scheduled offering no later than close of business five (5) business days after course end date.

Note: *The **Active** box should be unchecked on the scheduled offering Summary tab.*

SCHEDULED OFFERINGS FOR NASA SAFETY TRAINING CENTER (NSTC)

NSTC items have been created and placed in the SMA domain. All NSTC items have been given an item ID that begins with SMA-SAFE-NSTC- followed by a number. To prevent duplication of items and to ensure accurate reporting on completion of NSTC items, two rules must be followed:

NASA Business Rule

- Center administrators shall *not* create their own NSTC items and place them in their center's domain.
- NSTC administrators should schedule the NSTC items that are in the SMA domain and should place those scheduled offerings in the SMA domain.
- Center administrators shall *not* create schedule offerings for NSTC items and place them in their center's domain.

To maximize enrollment into NSTC offerings, all NSTC items and scheduled offerings appear in the NASA catalog. In cases where NSTC offerings enable self-registration, learners must know the center at which the offering is taking place when they are viewing the offering in the catalog.

NASA Business Rule

NSTC administrators shall add the centers prefix to all center facility Description fields. This rule is also cited in the business rules for **Other Center Training**.

The NSTC at Johnson Space Center is responsible for managing the shipment of course materials to all of the centers. In order to help them gauge the number of materials to reproduce or order and to ship the appropriate number of materials to the centers, they must have adequate lead time.

NASA Business Rule for NSTC Administrators Only

When entering a registration cut-off date for an NSTC scheduled offering, the registration cut-off date must be at least 30 days from the start date of the offering.

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Scheduled Offering Data

  The Scheduled Offering Data report returns detailed information about each schedule offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

- Learning Calendar

  The Learning Calendar report returns all the daily learning events scheduled between two dates.

CONCLUSION

In this lesson, you were introduced to the main scheduled offering concepts, tabs within the record, and the information contained on each. Using the step-by-step instructions, you created a new scheduled offering and entered key information.

You should now be able to:

- Define a scheduled offering terminology
- Create a scheduled offering
- Describe the purpose of the main tabs within a scheduled offering

In the next lesson, you will learn how to work with scheduled offering segments and resources.

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   If you edit the scheduled offering notification, the changes will be displayed the next time the item is scheduled.

2. True or false:
   An admin can be listed on the Contacts tab of a scheduled offering record.

3. True or false:
   If the work week profile is set up so that Saturday is not a training day at a facility, training can never be scheduled on a Saturday through SATERN.

4. True or false:

   If you want to display the start and end times of the segments of a scheduled offering in a specific time zone (and not have the system recalculate it and display it to all administrators and learners in their preferred time zones), you should check the **Show in this Time Zone** checkbox.

5. A scheduled offering is:
   a) An instructor-led or blended learning item with a scheduled date and time.
   b) An assignable unit that a learner must complete.
   c) A grouping of curricula.
   d) None of the above.

6. Define the term **scheduled offering**.

____

____

____

____

____

Activity

You have been given the following task:

- Management has decided to offer item X to the employees.
- Your boss has told you it will be held two weeks from today from, 9:00 AM – 5:00 PM.
- She wants this scheduled offering to be viewable to all learners.

Use SATERN to perform this task.

Notes

Lesson 2: Segments

Once you create a scheduled offering, you may need to update the date/time and change resource allocation. This information is managed under the Segments tab of the scheduled offering record.

Objectives

Upon completion of this lesson, you will be able to:

- Modify segments of a scheduled offering
- Assign resources to a segment

Segment Main Concepts

A segment is a block of instruction within a scheduled offering. Scheduled offerings must contain at least one segment. If a learner is registered in a scheduled offering, he/she is registered in all segments. Segments contain any applicable resources (locations, equipment, instructors, etc.) needed for the specified timeframe.

Course duration is written to history based on the segment time that is entered. If administrators do not exclude the lunch break for a full, eight-hour day, the break will be included in official course time recorded to the learner's history.

NASA Business Rule

When scheduling an eight-hour day, enter two four-hour blocks/segments with a half-hour or hour time block for lunch so that only 8 hours is recorded. This time block is referred to as a "segment offset" When a scheduled offering is added to SATERN, it is created using the default segment structure from the Delivery Data tab of the item record.

RESOURCES ASSIGNED TO SEGMENTS

A segment can have multiple resources of the same type (e.g., two instructors). Once a resource is assigned to a segment, it is "booked," and if another admin attempts to schedule the resource during the same timeframe, SATERN alerts him/her that there is a conflict. An admin can view the conflict and take the appropriate steps to free up that resource or find an alternative, (additional information provided about this topic later in the lesson).

In order for an admin to assign a resource to a segment, the resource record must already exist in the SATERN database.

Activity

Using an item that you would schedule, list the resources you will need. How do you currently schedule and track these resources?

ASSIGNING RESOURCES TO SEGMENTS

SATERN provides the ability to schedule resources for the specific segments (times) in which they are needed instead of scheduling them for an entire scheduled offering.

Assigning Instructors

Once the instructor is identified, he/she can be assigned to the segment(s) within a scheduled offering (Figure 11).

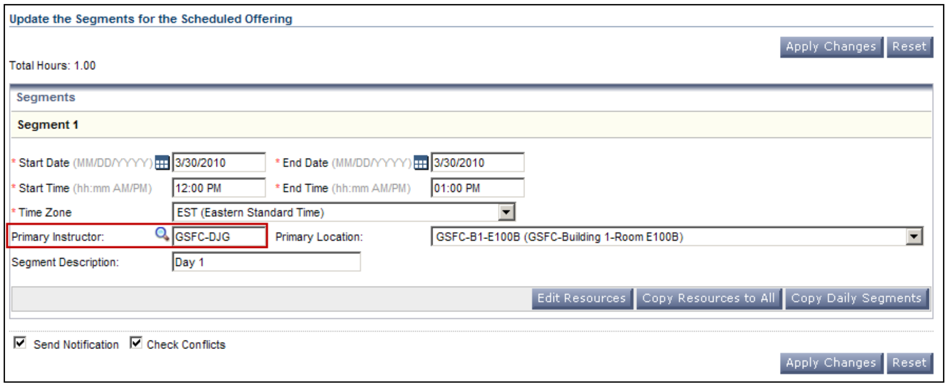

Figure 11. Segment – Primary Instructor

If the Instructor field is searchable, the search window displays the item type and ID (Figure 12 and Figure 13). SATERN assumes the admin wants to search the database for instructors who are "authorized" to teach this item. If this is not the case, the admin can remove this information, and SATERN returns all instructors in the search results.

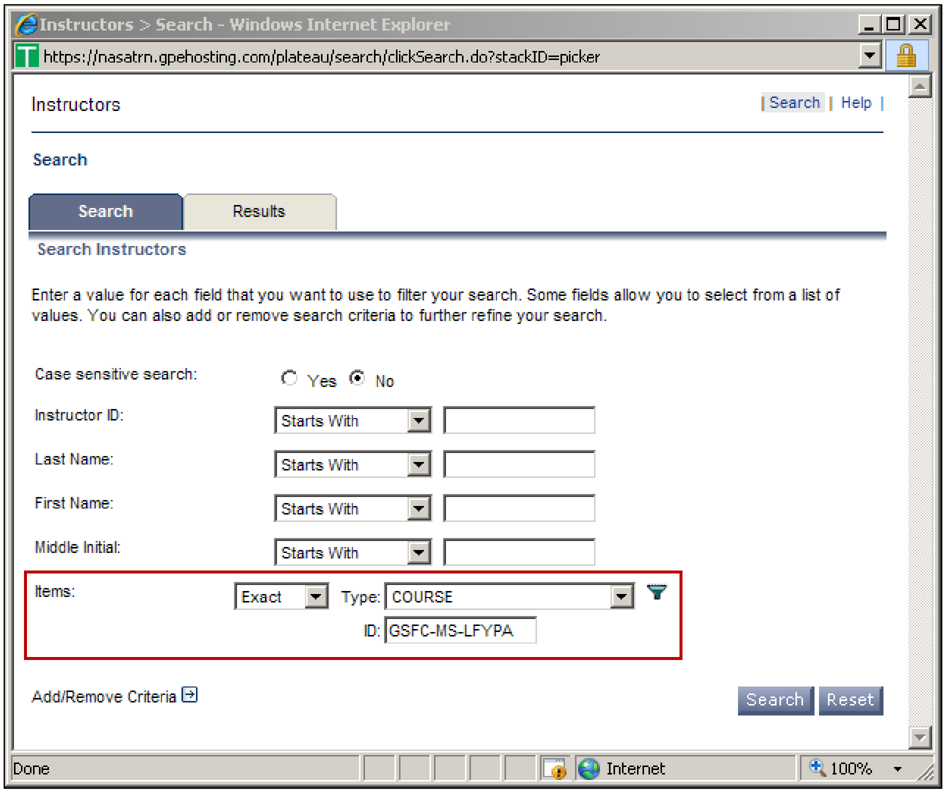

Figure 12. Primary Instructor Search

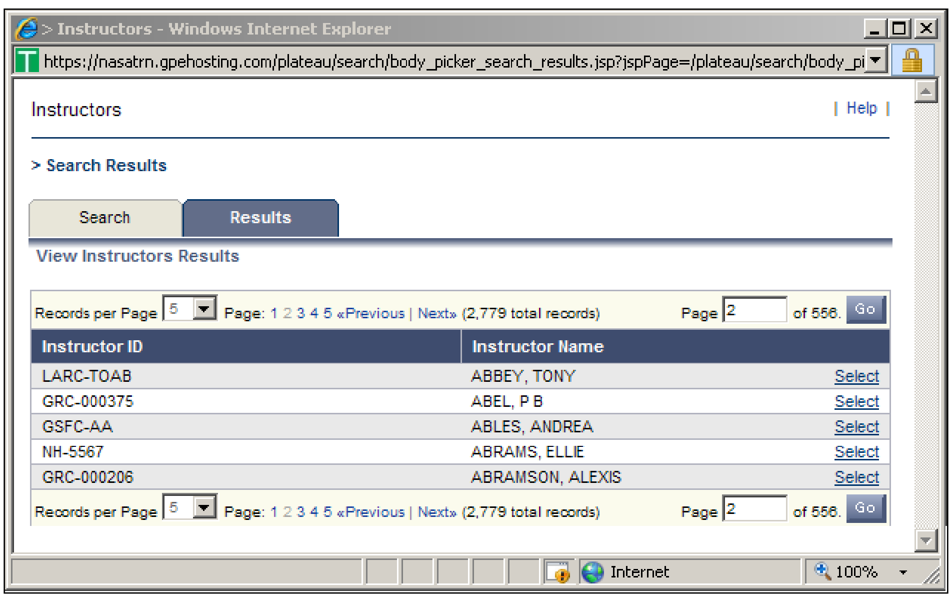

Figure 13. Primary Instructor Search Results

Assigning Locations

Locations are required and once the admin has identified the room of the training event, he/she can assign it to the segment(s) within a scheduled offering (Figure 14).

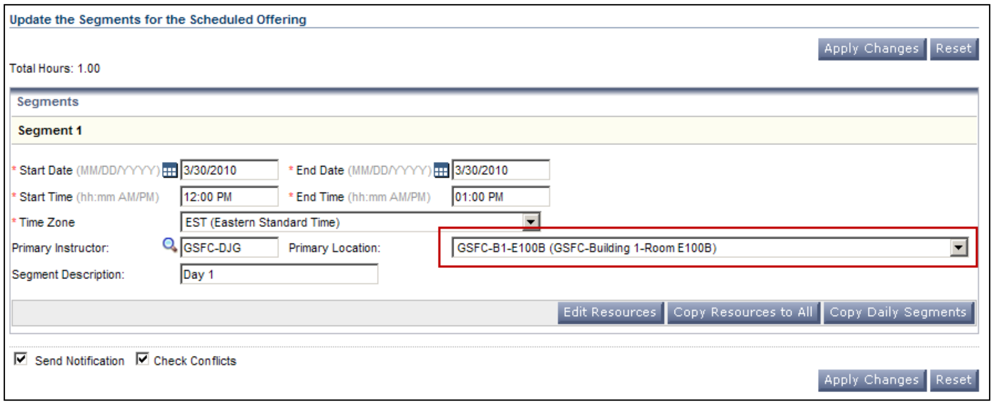

Figure 14. Segment – Primary Location

Resource Conflict Message

If the admin selects a resource that is already scheduled for the same time in which he/she is trying to schedule it, SATERN displays a warning message (Figure 15).

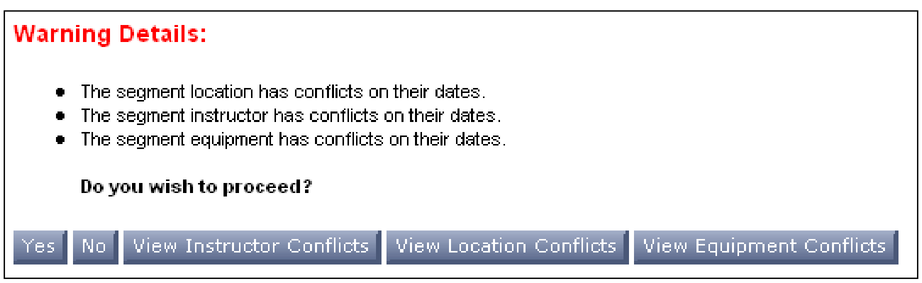

Figure 15. Resource Conflict Warning Message

Error messages prevent conflicts in the system and assist the work of the administrator, but SATERN does not have the functionality to resolve the conflict within the system. Since centers use differing methods for scheduling resources, Agency guidance is required.

NASA Business Rule

While SATERN will provide an error message if instructors or locations are double-booked, administrators shall ensure the availability of resources outside the system prior to scheduling them in SATERN.

Lab 3. Assigning Resources to Segments

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. Select the **Segments** tab.

5. Scroll to the *Update the Segments for the Scheduled Offering* section.

6. In the first segment, select a primary instructor.

__Note__: When searching for an instructor, the search screen defaults with the item information entered as search criterion. If you do not remove this criterion, SATERN returns only instructors who are authorized to teach this item.

7. Select a primary location.

8. Check the **Send Notification** and **Check Conflicts** checkboxes.

9. Click **Apply Changes**.

Assigning Additional Resources to Segments

SATERN provides the ability to assign multiple instructors and locations to a specific segment. The admin may also schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, the admin clicks the **Edit Resources** button for the segment in which he/she wants to schedule them (Figure 16).

Copying Resources

Once resources have been assigned to a segment, they can be copied to all remaining segments for that particular scheduled offering. This could be useful for a scheduled offering that takes place over a five-day period, thereby likely having at least five segments. If the resources will be the same for all segments, the admin can assign the resources to the first segment (apply changes) and then use the **Copy Resources to All** button (Figure 16).

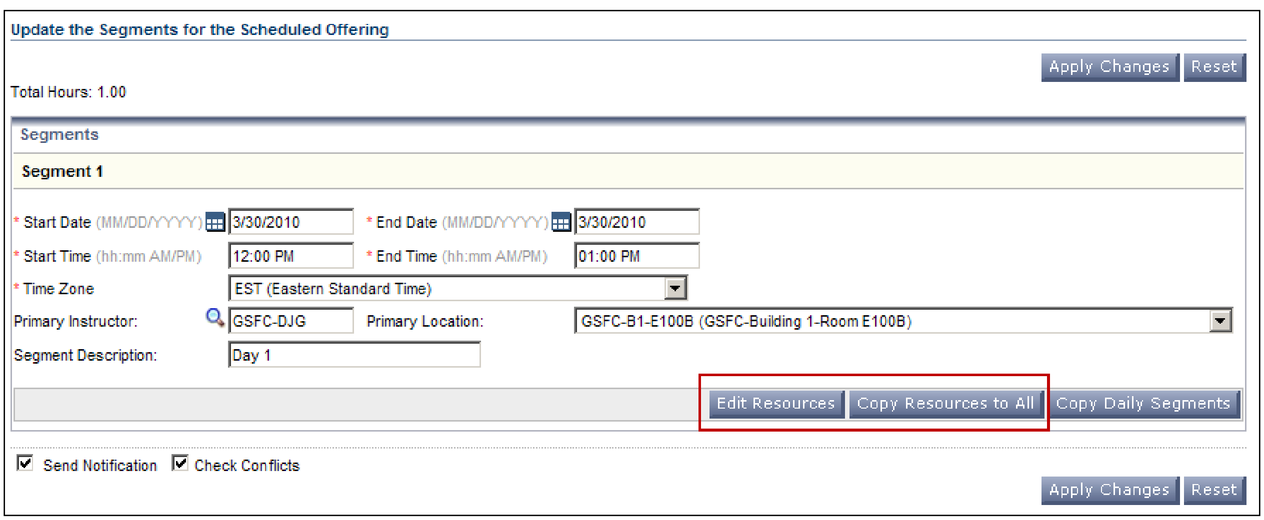

Figure 16. Edit and Copy Resources

Lab 4. Adding a Second Instructor to a Segment

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click the **edit icon** to access the scheduled offering in edit mode.
4. Select the **Segments** tab.
5. Scroll to the *Update the Segments for the Scheduled Offering* section.
6. Click the **Edit Resources** button in the first segment.
7. Select the **Instructors** tab.
8. Click the **add one or more from list** link.
9. Enter search criteria to search for an instructor.
10. Click **Search**.
11. Click the **Add check**box next to the desired instructor.
12. Do not click the **Primary** radio button.
13. Click **Add**.
14. Click **Return to Scheduled Offering**.

Note: *Note that only the primary instructor is displayed for the segment.*

ADDITIONAL SEGMENTS

Once a scheduled offering is created, the admin has the ability to add or remove segments from that scheduled offering. The default segment structure is established through the Delivery Data tab of the item record.

The admin can add a new segment to the scheduled offering in either the *Add a Segment to the Scheduled Offering* section (Figure 17) or the **Copy Daily Segments** button (Figure 18).

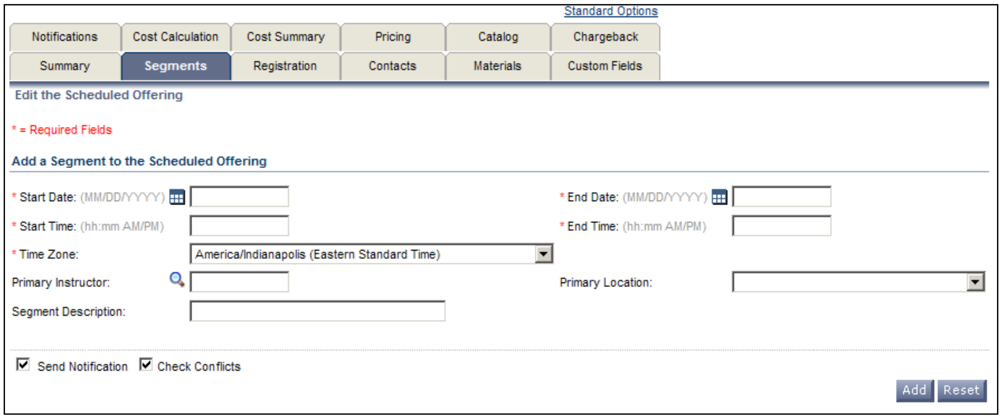

Figure 17. Add a Segment to the Scheduled Offering

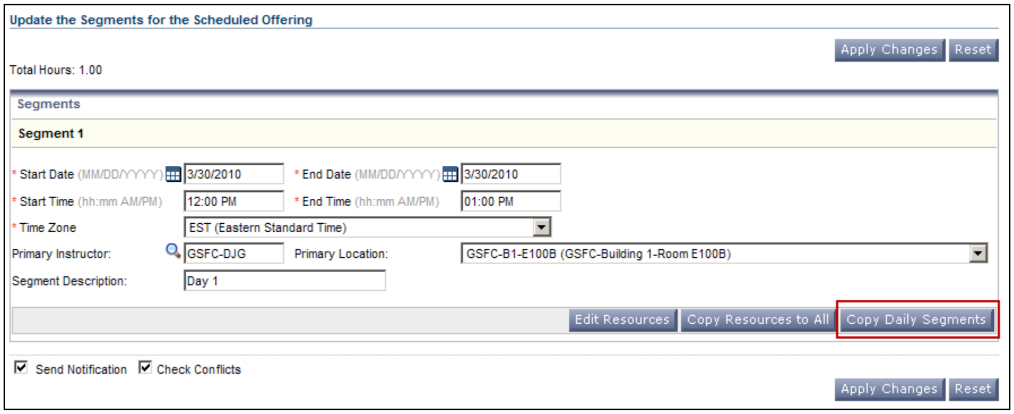

Figure 18. Copy Daily Segments

Lab 5. Adding Segments to a Scheduled Offering

Add a New Segment

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. Select the **Segments** tab.

5. In the *Add a Segment to the Scheduled Offering* section, enter segment information:

   a. Start date and time

   b. End date and time

   c. Primary instructor

   d. Primary location

   e. Description

6. Click **Add**.

7. Scroll down to the *Update the Segments for the Scheduled Offering* section and view the new segment.

Note: *Fields with a + are NASA required; fields with red asterisks* * *are system required.*

Copy Daily Segments

Step

1. Next to the segment just created, click the **Copy Daily Segments** button.

2. Enter the number of times to copy the segment.

Note: *This will create each duplicate segment(s) on a different day. You can modify the new segment dates, times, and time zones once they are created.*

3. Click the **Copy** button.

4. View the new segment(s).

Note: *The resources assigned to the original segment are carried over to the new segment(s).*

5. Modify the description for each new segment.

6. Change the end time of one of the new segments.

7. Click **Apply Changes**.

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Scheduled Offering Data

  The Scheduled Offering Data report returns detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

CONCLUSION

In this lesson, you were introduced to key segment concepts, including assigning resources and adding additional segments to a scheduled offering. Using step-by-step instructions, you assigned instructors and locations to segments and added new segments to a scheduled offering.

You should now be able to:

- Modify segments of a scheduled offering
- Assign resources to a segment

In the next lesson, you will learn how to set registration parameters and register learners for scheduled offerings.

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. You have just become aware that the scheduled offering times and location have changed. What steps should you take to make the changes and inform all concerned parties?

2. List three types of resources that can be assigned to a segment:

3. True or false:
   If you receive a conflict-warning message, you cannot schedule that resource for that specific time.

4. True or false:
   If a piece of equipment is attached to a location, and you reserve the location, you must still reserve the piece of equipment if you need it for your scheduled offering.

Notes

Lesson 3: Registration

Now that the scheduled offering is configured, we can register learners. In this lesson, you will learn the registration process to register learners for scheduled offerings.

Objectives

Upon completion of this lesson, you will be able to:

- Define the five registration statuses
- Set the registration parameters for a scheduled offering
- Register learners for a scheduled offering
- Use the Registration Assistant Tool
- Define and reserve slots for a scheduled offering
- Cancel a scheduled offering

Registration Main Concepts

How a learner registers for a scheduled offering is determined on an offering-by-offering basis. If configured by checking the **Self Registration** checkbox on the Summary Tab, learners may self register for the scheduled offering. Supervisors may also be given the ability to register subordinates. Otherwise, administrators must register learners in scheduled offerings. When learners are officially registered and have a status of *Enrolled*, the system is capable of generating e-mail notifications and sending them to the learner, his/her immediate supervisor, the instructor, and any other contact associated with the offering; if the corresponding checkboxes are selected at the time of registering the learner.

A learner may have one of following SATERN defined registration statuses:

- **Enrolled:** The learner has a seat in the scheduled offering.
- **Waitlisted:** The learner is waiting for a seat to open. (If **Auto Fill Registration** is checked, SATERN automatically registers a waitlisted learner when another learner cancels/withdraws. SATERN prioritizes the waitlist as first one on the waitlist is the first registered into the offering.)
- **Cancelled:** The learner does not have a seat.
- **Pending:** System assigned for learners "pending" approval in a SATERN defined approval process.
- **No-Show:** In instances where a learner does not show up for training, the administrator needs to indicate this in SATERN since SATERN cannot know if the learner attended the training.

NASA Business Rule

If a learner does not show up for training, administrators shall change the learner's registration status from *Enroll* to *No Show* on the Registration tab of the scheduled offering prior to recording the learning event. This takes the learner off the roster for the scheduled offering and does not record a training completion to the learner's history.

REGISTRATION DETAILS

If a scheduled offering is made available for learner self-registration, an approval process may be specified. If so, the learner is registered with a *Pending* status until the approver(s) have allowed registration to continue. (See *Training Approvals* guide for more information.) If approval is required, the admin indicates which approval process should be used by entering the ID in the Approval Process ID field (Figure 19).

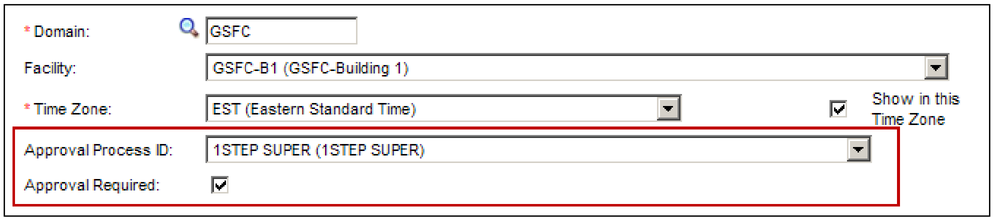

Figure 19. Summary Tab – Approval Required

Also on the Summary tab, the **Auto Fill Registration** checkbox may be checked so that the system automatically selects and registers the next learner on the waitlist should a registered learner withdraw (or be removed or cancelled by an admin). The learner who is listed first on the waitlist is registered first (Figure 20).

Figure 20. Auto Fill Registration Checkbox

If learner self-registration is desired, the admin must check the **Self Registration** checkbox at the bottom of the Summary tab screen.

Note: *Learners can self-register only if the scheduled offering resides in a catalog that they have access to.*

NASA Business Rule

If self-registration is enabled, an approval process must be selected and activated (Summary tab).

Also in this section, administrators configure the minimum and maximum registrants. If self registration and waitlisting are enabled, learners attempting to register after the offering is full are prompted to register with a waitlist status. Administrators are warned but not prevented from exceeding the maximum registration threshold.

The registration cutoff date and time prevents learners from self-registering after the date and time has passed. Administrators can still register learners after this date, but they receive a warning message (Figure 21).

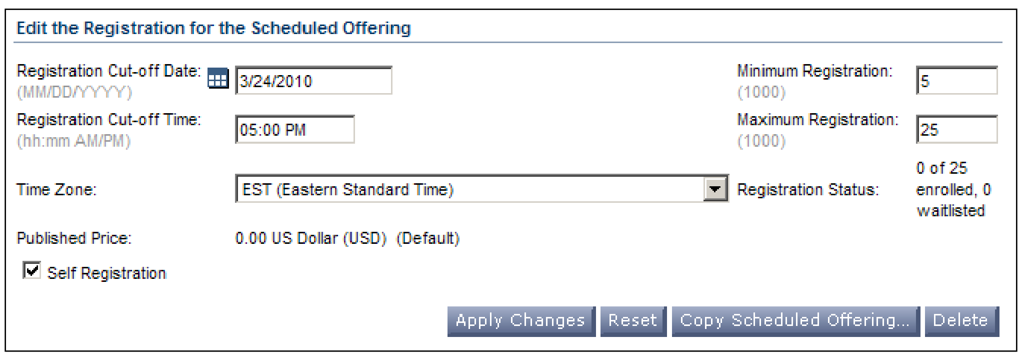

Figure 21. Registration Settings on Summary Tab

Lab 6. Setting Registration Parameters

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. On the Summary tab, click to check the **Enable Learners to Waitlist** checkbox.

5. Scroll to the bottom of the Summary tab.

6. Enter a registration cut-off date.

7. Enter a registration cut-off time.

Note: *Learners will not be able to see the scheduled offering after the registration cut-off date.*

8. Enter the minimum registrations.

9. Enter the maximum registrations.

10. Click to check the **Self Register** checkbox.

Note: *Checking this checkbox allows learners to register for this scheduled offering from the learner interface.*

11. Select an approval process from the drop-down menu.

12. Click the **Approval Required** checkbox

13. Click **Apply Changes**.

REGISTERING LEARNERS

Once it is determined that a learner needs to attend a scheduled offering of an item, the admin has the ability to register them for the offering (Figure 22)

Figure 22. Registration Tab: Scheduled Offering Record

If the admin checks the appropriate e-mail notification checkboxes during the registration process, the learner, his/her supervisor, and any other learners or instructors listed on the Contacts tab also receive e-mail notification of the registration.

Administrators may search for learners using any learner search criteria, or may select learners from the request list for the scheduled item. A request list is available if the admin enabled learner requests for the item. Once a learner has completed the request process for an item, it is placed on the request list. All learners who requested the item and have not been able to attend the course are listed on the request list, which makes it very easy for the administrator to pull learners from the list to enroll them into the scheduled offering. It is recommended that the admin check the request list to see if learners have requested to be registered for an offering of the item.

When adding learners to the registration of a scheduled offering, email confirmation checkboxes may be checked in order to notify the learner, instructor, supervisor, and any contacts listed on the Contacts tab. The default settings of these checkboxes may be configured globally in **System Admin > Configuration > Registration Settings**. These checkboxes are also available when an admin withdraws (removes), waitlists, or cancels a learner from the registration.

Lab 7. Registering Learners for a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. Select the **Registration** tab.

5. In the *Add a Learner to Scheduled Offering Registration* section, click the **add one or more from list** link.

6. Enter search criteria to search for learners to register for the offering.

7. Click **Search**.

8. Click the Add checkbox next to each learner you want to register.

9. Check the appropriate **Email confirmations to** checkboxes for those you want to receive confirmation for this offering.

Note: *It is recommended that you check all boxes. Instructors and supervisors will get one e-mail notification. Supervisors only receive subordinates' names in the e-mail, while instructors receive everyone registered in the offering.*

10. Click the **Add** button.

11. Scroll to the *Edit the Registered Learner for the Scheduled Offering* section and view the learners who are registered for the offering.

Lab 8. Registering Learners from the Request List

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. Select the **Registration** tab.

5. In the *Add a Learner to Scheduled Offering Registration* section, click the **add from the request list** link.

6. Click the **Add** checkbox next to each learner you want to register.

7. Check the appropriate **Email confirmations to** checkboxes for those you want to receive confirmation for this offering.

__Note__: It is recommended that you check all boxes. Instructors and supervisors will get one e-mail notification. Supervisors only receive subordinates' names in the e-mail, while instructors receive everyone registered in the offering.

8. Click the **Add** button.

9. Scroll to the *Edit the Registered Learner for the Scheduled Offering* section and view the learners who are registered for the offering.

WORKING WITH SLOTS

When an organization requests seats in a scheduled offering but cannot provide the names of the individuals who will attend, the admin can use the slots feature of SATERN. Slots allow the admin to reserve seats in a scheduled offering without having to register specific learners.

Slots are reserved for organizations, enabling only learners who belong to the organization to register in the slot (if self registration is enabled). If the offering is full, but slots are remaining, learners who are not a member of the organization may only join the registration as waitlisted (Figure 23).

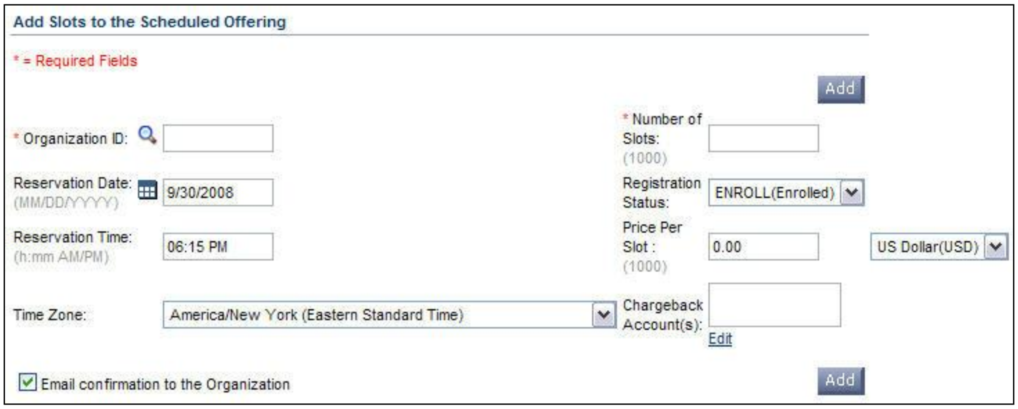

Figure 23. Registration Tab – Slots

Once slots are reserved, the number of open seats decreases by that number. For example, if there are 15 seats available in the class and the admin reserves three slots, 12 seats remain available for other learners.

Lab 9. Reserving Slots for a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click the **edit icon** to access the scheduled offering in edit mode.
4. Select the **Registration** tab.
5. In the *Add Slots to the Scheduled Offering* section, select an organization for which to reserve the slots.
6. Enter the number of slots to be reserved for the organization.
7. Enter the reservation date (defaults to current date).
8. Enter the reservation time (defaults to current time).
9. Select a registration status for slot reservations from the **Registration Status** drop-down menu.
10. Check the **Email confirmation to the Organization** checkbox.
11. Click the **Add** button.

REGISTRATION ASSISTANT

The Registration Assistant is a tool that helps streamline the process of registering learners from the admin side of SATERN. Using the assistant, administrators may register learners, withdraw learners, or reserve slots for a learner's organization.

Lab 10. Using the Registration Assistant

Step

1. Navigate to **Learning > Tools > Registration Assistant**.
2. Select the **Register Learners** menu option.
3. Click the **Next** button.
4. Search for and select an existing scheduled offering for which you would like to register learners into.
5. Click the **Next** button.
6. Click the **add one or more from list** link.
7. Search for the desired learner(s).
8. Check the **Add** checkbox next to each learner being registered in the offering.
9. Select registration status for each learner.
10. Click the **Add** button.
11. Verify that all the learners you selected are listed.
12. Click the **Next** button.
13. Add any necessary comments and click the **Next** button.
14. NASA does not use the Financial Data in SATERN. Click the **Next** button.
15. Verify that all information is correct.
16. Check all the applicable **Email confirmation** checkboxes.
17. Click the **Finish** button.

SATERN Rosters for Verification

A SATERN roster includes the printed name of the employees registered and provides a place for their signature. This form allows administrators to clearly see who is registered and who did or did not sign in for the class. Therefore the following business rule is recommended.

NASA Business Rule

For scheduled offerings in SATERN, the Center Training Office should use only **SATERN** rosters for sign-in and attendance verification, and should send only SATERN generated rosters to the NSSC for course close-out process. The NSSC shall only accept **SATERN** rosters.

Canceling a Scheduled Offering

If a scheduled offering that has been created cannot be delivered, the admin may choose to cancel it. This process allows the admin to move any learners who were registered with an *Enrolled*, *Waitlisted*, or *Pending* registration status to the request list for the item. During the cancellation process, the administrator can also choose to inactivate the scheduled offering making the offering unavailable to learners.

Lab 11. Canceling a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. On the Summary tab, click the **Cancel the Scheduled Offering** link.

5. Leave the default cancellation date and then click the **Next** button.

6. Click **Next** without making changes.

Note: *There are no costs required for this lab.*

7. Check the appropriate checkboxes to add registered learners to the item request list, send email notifications, and/or inactivate the scheduled offering.

8. Click **Next**.

9. On the Confirmation screen, click **Finish**.

10. Click **Return to Scheduled Offering**.

11. Select the **Registration** tab.

12. Verify that the learners' status has changed to *Cancelled*.

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Scheduled Offering Data

  The Scheduled Offering Data report returns detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

- Registration Status

  The Registration Status report returns, for offerings and learners, a detailed list of registration information including registration dates and times, enrollment numbers, instructors, and scheduled offering details.

- Scheduled Offering Roster

  The Scheduled Offering Roster report returns the roster of learners in a scheduled offering.

- Sign-In Sheet

  The Sign-In Sheet report displays the scheduled offering roster and lines for learner to sign into class.

- Slot Status

  The Slot Status report returns, for organizations and scheduled offerings, the current status of any slots that have been purchased. Where learner names have been identified to fill the slots, the learner names are included in the report, along with registration status and schedule information. You can group the report by organization or scheduled offering.

CONCLUSION

In this lesson, you were introduced to registration concepts for scheduled offerings. Using the step-by-step instructions, you learned how to set up the registration parameters, register learners for scheduled offerings, and use slots to reserve seats for a scheduled offering. Finally, admins cancelled a scheduled offering.

You should now be able to:

- Define the five registration statuses
- Set the registration parameters for a scheduled offering
- Register learners for a scheduled offering
- Use the Registration Assistant Tool
- Define and reserve slots for a scheduled offering
- Cancel a scheduled offering

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   All of the learner registration options on a scheduled offering are determined within the Registration tab.

2. What are the registration options available to the admin?

   ____

   ____

   ____

   ____

   ____

3. True or false:
   You can reserve slots for learners who work in a specific job location.

Activity

Your boss has given you the following task:

- We forgot to create and register learner for the item X course that you took last week.
- Create a scheduled offering for 7 days ago and register yourself and four other learners.
- Record the scheduled offering ID.

Notes

Lesson 4: Record Learning Events and Inactivating Scheduled Offerings

The goal of Lesson 4 is to provide a general understanding of the Learning Event Recorder. Recording a learning event creates a Learning History record for learners and allows those learners who successfully complete a scheduled offering to generate a certificate of completion. After the scheduled offering is complete, an admin needs to record learning events for all the participants. In this lesson, you will learn how to record learning events for scheduled offerings that have taken place and to inactivate scheduled offerings that have been completed and recorded. Scheduled offerings may be created by the Center while others may be created by the NSSC. Consequently, if NSSC creates the scheduled offering, they may record the learning event and also inactivate the scheduled offering.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Define a learning event
- Record a learning event for a scheduled offering
- View the learning event in the Learning History
- Inactivate scheduled offerings

Learning Event Main Concepts

A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of attendance or completion of any external event considered important enough to document but not related directly to learning needs

Administrators using the Learning Event Recorder may choose to record completions for all learners registered in a selected scheduled offering. The system does not prevent the admin from recording completions for those learners who were never registered. This is useful for those last minute registrants who were not actually registered in the scheduled offering but did attend. However, it is recommended for the admin to register learners in the scheduled offering even after the delivery date has passed, for reporting purposes. Once the event is recorded, a Learning History record is created for the learner. If an error is recorded, the administrator may have the ability to edit it with the Learning Event Editor (if he/she has been given the appropriate workflow).

Types of Learning Events

There are two types of learning events:

- Item-based events (including scheduled offerings)
- External events

Item-Based Events

Items are the primary events found in the list of learning events for learners. Learning events for items include those that were created as scheduled offerings and those with online content where the system records the learning event when the learner completes the content. All items may have a learning event recorded against them for any learner, even if the item was not a part of his/her Learning Plan.

External Events

An external event would be an event completed by a learner or group of learners that an item has not been created for and an external training request process has not carried out. This external event allows for a description and comment field to further identify the nature of the training.

DATA RECORDED IN A LEARNING EVENT

The following information can be captured when recording the learning event:

- Learners to receive a completion status for the scheduled offering
- Item key and title
- Instructor
- Item completion status and/or completion grade: indicates whether or not an item was successfully completed.
- Completion date/time
  - Enter the actual completion date of the item. This is extremely important in times when the course requires the learner to complete it on an on-going interval as retraining due dates are based upon last completion.
- Hour types: Total, credit, contact, and CPE hours
- Comments

ACCESSING THE LEARNING EVENT RECORDER

When recording a learning event through Quick Links, the Record Learning tool, the custom fields, per eiem, travel, Book_Material_Cost, and Per_Participant_Cost are not available to complete. These fields only show up if you use the Learning Event Recorder (Learner Management > Tools > Learning Event Recorder).

NASA Business Rule

The Record Learning Event feature through Quick Links shall never be used to record a learning event. All recorded learning events shall use the Learning Event Recorder (Learner Management > Tools > Learning Event Recorder).

Navigate to **Learner Management > Tools > Learning Event Recorder** (Figure 24).

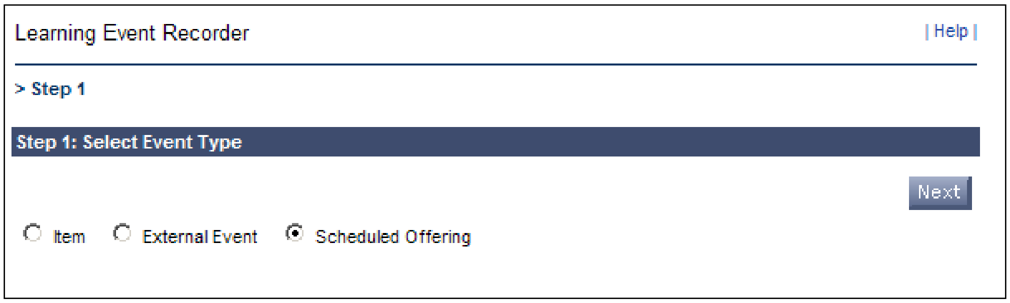

Figure 24. Learning Event Recorder

Lab 12. Record a Learning Event for a Scheduled Offering

Step

1. Navigate to **Learner Management > Tools > Learning Event Recorder**.

2. Click the **Scheduled Offering** radio button.

3. Click **Next**.

4. Click the **Select Scheduled Offering** icon.

5. Enter search criteria to search for the scheduled offering.

6. Click **Search**.

7. Click the **Select** link next to the scheduled offering to select.

8. Click **Next**.

9. Select a **Default Completion Status** from the drop-down menu.

10. Click **Next**.

2\. Click the **add one or more from list** link.

3\. Enter search criteria to search for learner to record the learning event.

4\. Click **Search**.

5\. Click the **Add** checkboxes next to the learners for which to record the learning event.

6\. Click the **Add** button.

7\. Click **Next**.

8\. Enter any comments for the learner(s).

9. Change the status and grade, if necessary.

10. Click **Next**.

11. Enter any cost information as necessary, click **Next**.

12. Review the information.

13. Click **Finish**.

Note: *The* ***Start Over*** *button allows the admin to repeat the process of recording another learning event for the same set of learners.*

Learning History

A learner's Learning History is made up all learning events that have been recorded, either for credit or not for credit in SATERN. The administrator is able to view (but not change or edit) a learner's history from the Learning History tab of the learner record. Learning events can be edited with the Learning Event Editor found under the Learner Management menu within SATERN.

Items with Retraining

Select items within a curriculum that must be repeated on a recurring interval will have a retraining assignment. Once the item is complete and recorded (in the learner's Learning History), it is flagged as complete and the next *required by* date it is due according to the date calculated by the retraining assignment. In this situation, the admin will see the item in the Learning Plan with the new date for completion and in the Learning History with the date completed.

Certificate of Completion

Admins or learners can print certificates upon successful completion of an item. Certificates are generated in `.pdf` format and will open in Adobe Acrobat Reader. Certificates are not generated within SATERN for external events.

Learning Event Editor

Learning events may be edited with the Learning Event Editor found under the Learner Management menu. Administrators need to be given permissions to edit or delete learning event records.

INACTIVATING SCHEDULED OFFERINGS

When administrators are looking for active scheduled offerings in SATERN, they have to also search through scheduled offerings whose date has passed and are still active. As a result it is difficult to get a clean list of those offerings which are currently active which is inefficient when an admin is looking for a specific class.

NASA Business Rule

Once the date of a scheduled offering has passed, and all the completion credit has been given to the learners, the SATERN administrator should set the offering to inactive. To accomplish this, the SATERN administrator should use the regular process to close out the offering and uncheck the active box. The **close the scheduled offering** button on the Summary tab of the scheduled offering should not be used.

Lab 13. Inactivating a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings.**

2. Enter search criteria to find the scheduled offering that you recorded a learning event for in Lab 12 and click **Search**.

3. Edit the scheduled offering.

4. On the summary tab scroll down to locate the **Active** checkbox.

5. Deselect the **Active** checkbox

6. Click **Apply Changes.**

LESSON-RELATED REPORTS

The Certificate of Completion for Scheduled Offerings report in SATERN relates to this lesson. This report prints the certificates of completion for learners by scheduled offering.

CONCLUSION

In this lesson, you recorded learning events for learners using the Learning Events Recorder. Using the step-by-step instructions, you recorded completed items and external events.

You should now be able to:

- Define a learning event
- Record a learning event for a scheduled offering
- View the learning event in the Learning History
- Inactivate scheduled offerings

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. What data can be recorded in a learning event?
   a) Completion date and status
   b) Learner information
   c) Item information
   d) All of the above

2. True or false:
   Administrators cannot record learning events for learners who were not registered in the scheduled offering originally.

Notes

Lesson 5:
Copying Scheduled Offerings

It can take a long time to setup scheduled offerings one by one. Copying allows the admin to copy scheduled offerings and assign resource to one or more future dates.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Describe the scheduled offering copying options
- Copy a scheduled offering

COPYING A SCHEDULED OFFERING

Sometimes items are scheduled to be delivered multiple times. After the original scheduled offering is created, the copy feature allows the admin to create duplicates, complete with associated resources and registration parameters. These copies of the original offering can be scheduled to occur once or repeat according to specific scheduling rules. These rules include copying multiple times every ‘x’ number of days, weeks, or months, and can be configured to end after a certain number of scheduled offerings have been created (Figure 25).

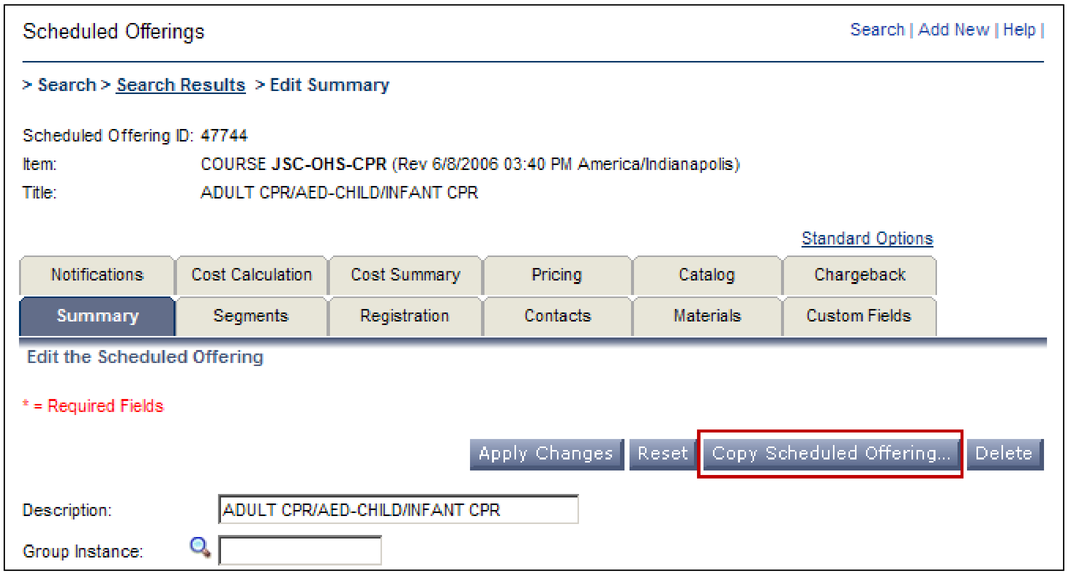

Figure 25. Copy Scheduled Offering

Figure 26 shows available options for creating a single copy of the scheduled offering.

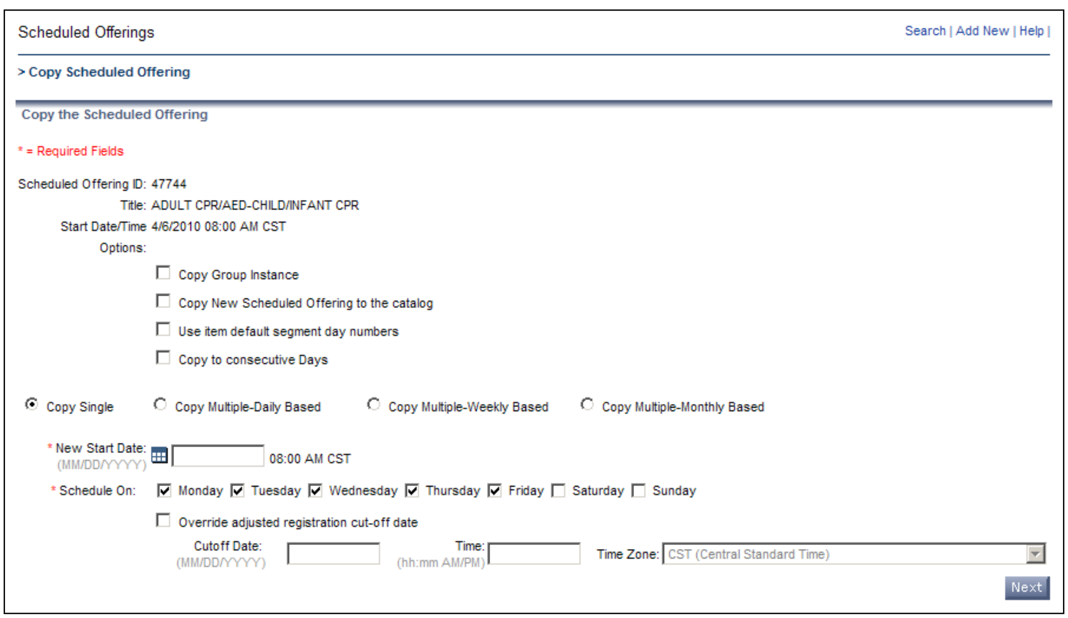

Figure 26. Options for 'Copy Single'

Figure 27 shows available options for creating multiple copies of the scheduled offering to be held daily.

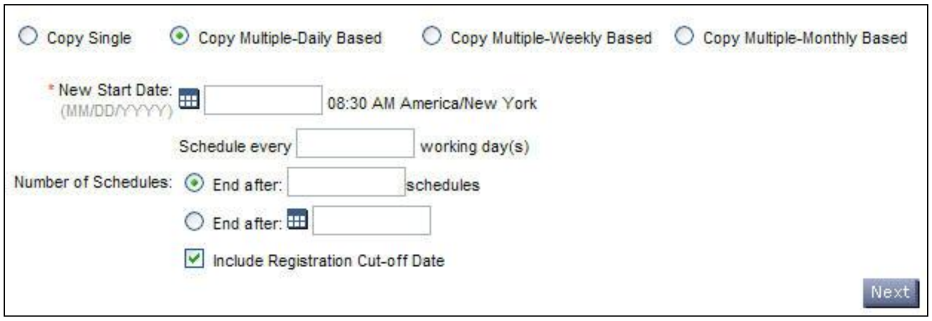

Figure 27. Options for 'Copy Multiple–Daily Based'

Figure 28 shows available options for creating multiple copies of the scheduled offering to be held weekly.

Figure 28. Options for 'Copy Multiple–Weekly Based'

Figure 28 shows available options for creating multiple copies of the scheduled offering to be held monthly.

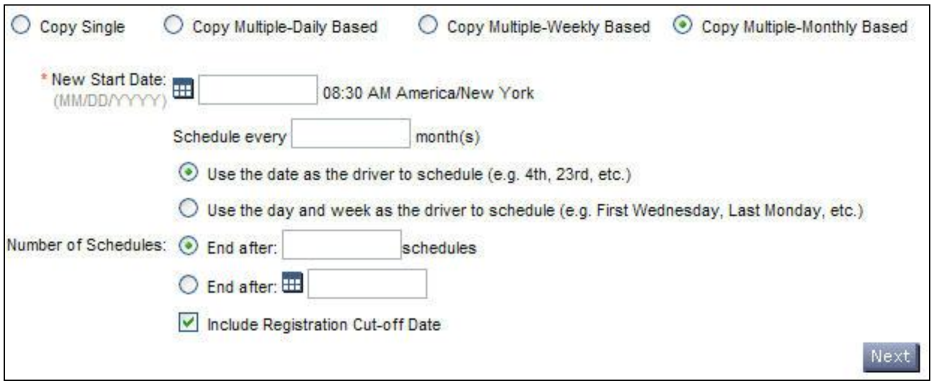

Figure 29. Options for 'Copy Multiple–Monthly Based'

Lab 14. Copy a Scheduled Offering (Multiple–Weekly Based)

Step

1. Navigate to **Learning > Scheduled Offerings**.

2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.

3. Click the **edit icon** to access the scheduled offering in edit mode.

4. Click the **Copy Scheduled Offering** button.

5. Click the **Copy Multiple–Weekly Based** radio button.

6. Enter a new start date in the **New Start Date** textbox.

Note: *Your instructor may direct you to use a date in the past so that one of your copies may be used in a future lab.*

7. Enter **1** in the **Schedule every ___ week(s)** field.

Note: *The system schedules a new offering every week.*

8. Select the **End after ___ schedules** radio button.

9. Enter **2** in this field.

Note: *This allows only two new offerings to be scheduled.*

10. Check the **Include Registration Cut-off Date** checkbox.

11. Click **Next**.

12. On the Confirmation screen, check the **Send Notification** checkbox.

Note: *The system sends emails to the contacts listed on the original scheduled offering record.*

13. Click the **Copy** button. Note the new scheduled offering IDs and start dates.

CONCLUSION

In this lesson, you created copies of a scheduled offering using different copy methods (e.g., daily, weekly, and monthly).

You should now be able to:

- Describe the scheduled offering copying options
- Copy a scheduled offering

LESSON CHECK

Use what you learned in this lesson to answer the following question.

1. List the different ways you can copy scheduled offerings.

____

____

____

____

____

Course Summary

Through lecture, activities, and hands-on computer lab work, this course taught you the concepts and terminology associated with scheduling instructor-led items in SATERN. You gained basic, hands-on experience using SATERN system functions to schedule items and assign resources.

You should now be able to:

- Describe the process for creating a scheduled offering
- Create a scheduled offering
- Assign resources to a segment within a scheduled offering
- Register learners for a scheduled offering
- Reserve slots in a scheduled offering
- Record learning events
- Copy scheduled offerings

Notes

Scheduling Management Extras

This section provides some extra learning-related topics, including:

- Creating resource records
- Working with classes

RESOURCES

You can set up scheduled offering resources in SATERN. Resources include:

- Instructors
- Equipment
- Materials
- Facilities
- Locations

Instructors

The instructor’s email address field is necessary for system generated notifications when instructors are added as resources to scheduled offering segments. In addition, when learners are registered to take the scheduled offering for which the instructor is a resource, the instructor can receive e-mail notification of the roster update (Figure 30).

Instructors will not have access to the system. Therefore, it is important that administrators know to work closely with instructors. It is the responsibility of the Training Office Administrator to provide instructors with the information they need. (If necessary, administrators can send e-mail notifications to instructors, copy them on rosters as learners are registered, and provide other details). SATERN does not require that an instructor be assigned to a scheduled offering, but it will give a warning when an administrator edits a segment without adding an instructor.

Instructors are added to SATERN by the NSSC in the Public domain. As a result, the instructors are available to every center in SATERN. Instructions on how to create an instructor follows:

Create regions for each center: ARC, DRFC, GFSC, GRC, HQ, JSC, KSC, LARC, MSFC, NSSC, SSC, WSFC, WSTF, JPL, MAF, ITS, and SMA.

Not identifying a region or center will not prevent an instructor from teaching at that center if desired later. This is only used in assisting to identify particular instructors and allowing searches for all qualified instructors at each center.

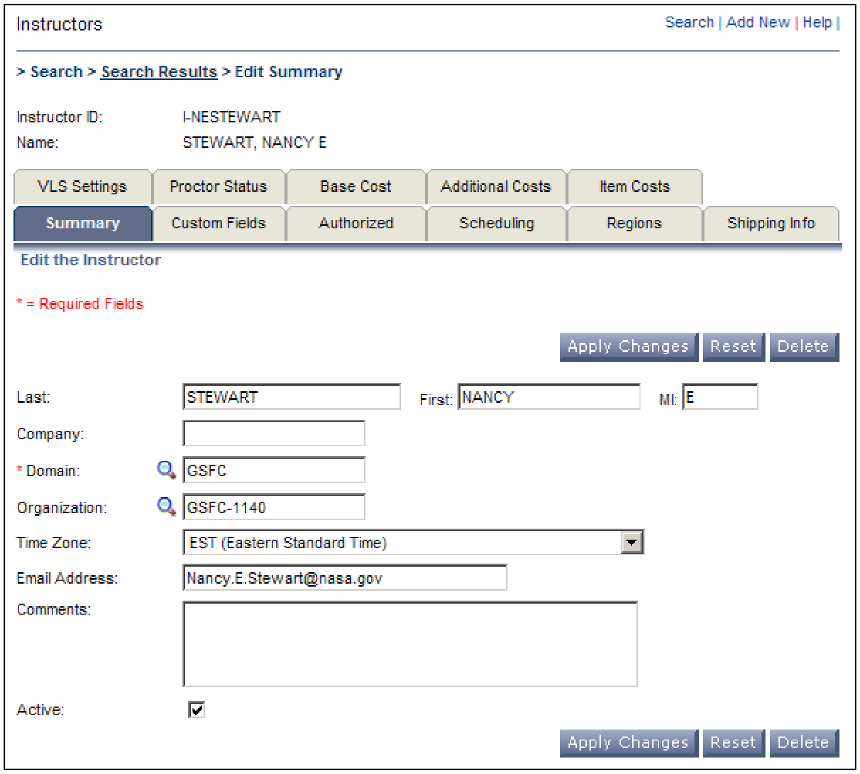

Figure 30. Instructor Record

Note: *Before creating an instructor record, check and make sure that instructor does not already have an account in SATERN. If the account already exists, you should modify the assigned regions to include the new region/center location and provide the instructor record ID to the original add instructor requester.*

NASA Business Rule

Create instructor IDs using the naming convention of **I-** (eye dash), first initial, middle initial, last name to identify instructor IDs versus other IDs within SATERN. Information required that should be included for instructors: ID, full name, company (if contractor or vendor), domain, and organization (if civil service).

Lab 15. Create an Instructor

Create an Instructor

Step

1. Navigate to **Learning > Resources > Instructors**.
2. Click **Add New**.
3. Enter an instructor ID.
4. Enter the instructor's last name, first name, and middle initial.
5. Enter the instructor's company.
6. Select a domain for the instructor.
7. Select an organization for the instructor.
8. Select a time zone for the instructor from the **Time Zone** drop-down menu.
9. Enter an e-mail address for the instructor.

Note: *Even though this field is optional, it is recommended that you enter an e-mail address so that the instructor receives all scheduled offering notifications.*

10. Verify that the **Active** checkbox is checked.
11. Click **Add**.

Once the account is added, move to the **Authorized to Teach** tab and add all courses this instructor is authorized to teach. When searching for an instructor to add to a scheduled offering, the search initially filters for instructors who are authorized to teach the scheduled item. Now move to the **Regions** tab and add the regions for each center this instructor is expected to teach at (home center or center of record should be selected as the primary to aid in identifying similarly named instructors from different locations).

Lab 16. Authorize an Instructor to Deliver Item

Step

1. From within the instructor record, select the **Authorized to Teach** tab.

2. Click the **add one or more from list** link.

3. Enter search criteria to search for the item(s) you want to add to the instructor's authorized list.

4. Click **Search**.

5. Click the **Add** checkbox next to all items to be added to the instructor's authorized list.

6. Click the **Add** button.

7. Verify that all selected items are added to the instructor's record.

Equipment

SATERN allows you to manage the use of any equipment. You are able to define the equipment types used by your organization (e.g., computer monitor, VCRs, projectors, simulators, etc.). When an admin schedules an event that requires the use of certain equipment, he or she can also check the inventory of equipment that is on-site and available for use.

Equipment types are defined in the Equipment window. Equipment ID and description are the minimum data required to create a new equipment record. The tabs in the equipment record include:

- Summary tab: Displays a description, domain, serial number of the item, and where it is currently assigned.
- Scheduling tab: Displays the scheduled offerings that the equipment is scheduled to support.

Equipment types are referenced in a few different locations within the system:

- Item level
- Delivery Data tab: Default equipment type requirements can be specified for segments of an item.
- Scheduled offering
- Equipment tab of the Scheduled Offering Details window: Here, specific items of equipment can be scheduled.

NASA Business Rule

Equipment IDs will consist of the center's acronym followed by a hyphen and a brief description go the equipment. For example, a television/VCR combination at Dryden Flight Research Center would have an ID of: DFRC-TV/VCR.

Lab 17. Add Equipment

Step

1. Navigate to **Learning > Resources > Equipment**.
2. Click the **Add New** link.
3. Enter equipment ID.
4. Enter a description for the equipment.
5. Select a domain for the equipment.
6. If available, enter a serial number.
7. Select the equipment type from the **Equipment Type** drop-down menu.
8. Select the equipment status from the **Equipment Status** drop-down menu.
9. If needed, select a facility for the equipment from the **Facility** drop-down menu.
10. If needed, enter the contact name.
11. If needed, enter comments.
12. Click **Add**.

Materials

Materials are the actual consumables needed for the scheduled offering, such as manuals, handouts, and other non-reusable items that are delivered along with the other aspects of training. Anything the learner needs and uses during training or retains after training can be managed as a material by SATERN.

You can also use the Inventory Assistant tool to specify the quantities of each type of material on hand at each facility, and specify a reorder point, so that, when the inventory drops below an acceptable level, an appropriate person can be notified to reorder. Materials are referenced in a few different locations:

- Resources level
- Materials section: Edit default information for materials, including descriptions.
- Item level
- Delivery Data tab: Default materials, quantities, and target for each instance of an item can be specified.
- Materials tab: Quantity, target, and offset can be specified for each material.
- Scheduled offering level
- Materials tab: The quantities, offset, and target, can be edited and, if necessary, overridden for each scheduled offering of the item. Materials on this tab can be identified as pre-work/post-work.
- Segment tab: Edit the target and quantity.

NASA Business Rule

Material IDs consist of the center's acronym followed by a hyphen and description. For example, the ID of a Career Styles Assessment located at Ames Research Center would be: ARC-CAREERSTLES**.**

Lab 18. Add Material

Step

1. Navigate to **Learning > Resources > Materials**.
2. Click **Add New**.
3. Enter a material ID.
4. Enter a description for the material.
5. Select a domain for the material.
6. If needed, enter a revision number.
7. If needed, enter comments.
8. Click **Add**.

Facilities

A facility is the building where training takes place, whereas the location is a room within the facility. A facility's holiday and work week profiles determine when it may be scheduled for training delivery (Figure 31).

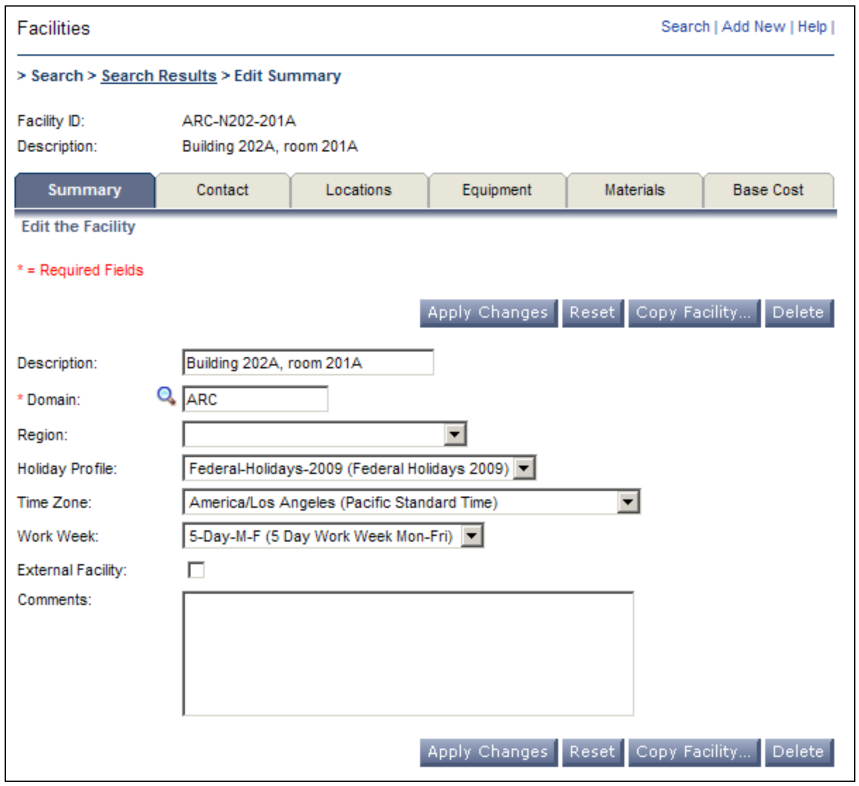

Figure 31. Facility Record

Holiday Profiles

The holiday profile works similar to the work week profile. Once a holiday profile is created, indicating the dates the facility is not open for training purposes, SATERN skips the indicated days when scheduled offerings are created. The system checks the facility’s holiday profile and issues an alert if the intended schedule dates include a non-working day; however, this can be manually overridden from within the scheduled offering (Figure 32).

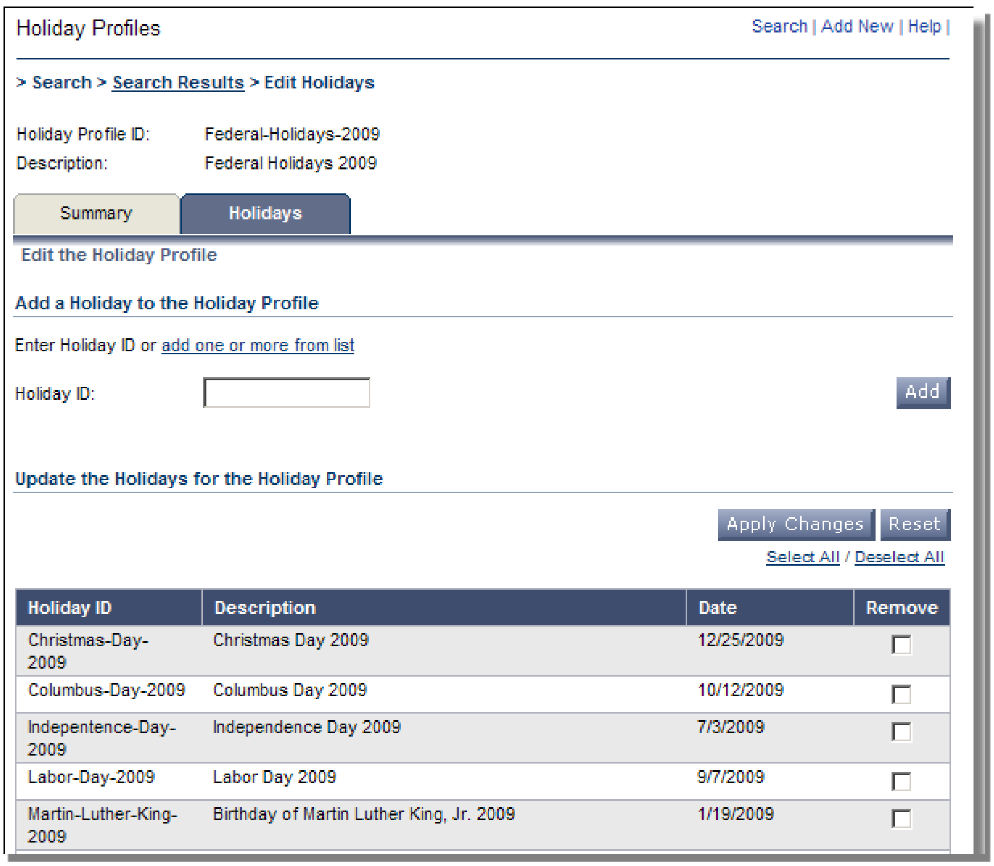

Figure 32. Holiday Profiles

Work Week Profiles

The work week profile can be created and associated with a specific facility to indicate which days of the week training occurs at that particular facility. If a facility is selected during the adding a scheduled offering process, SATERN skips the days that the facility is not “open” for training.

For example, if a six-day -tem is scheduled to start on a Monday at a facility open Monday-Friday, SATERN schedules the item Monday-Friday and the last day is scheduled for the following Monday. This can be manually overridden from within the scheduled offering. If no work week profile is assigned to a facility, SATERN assumes the training facility is open for business Monday through Friday (Figure 33).

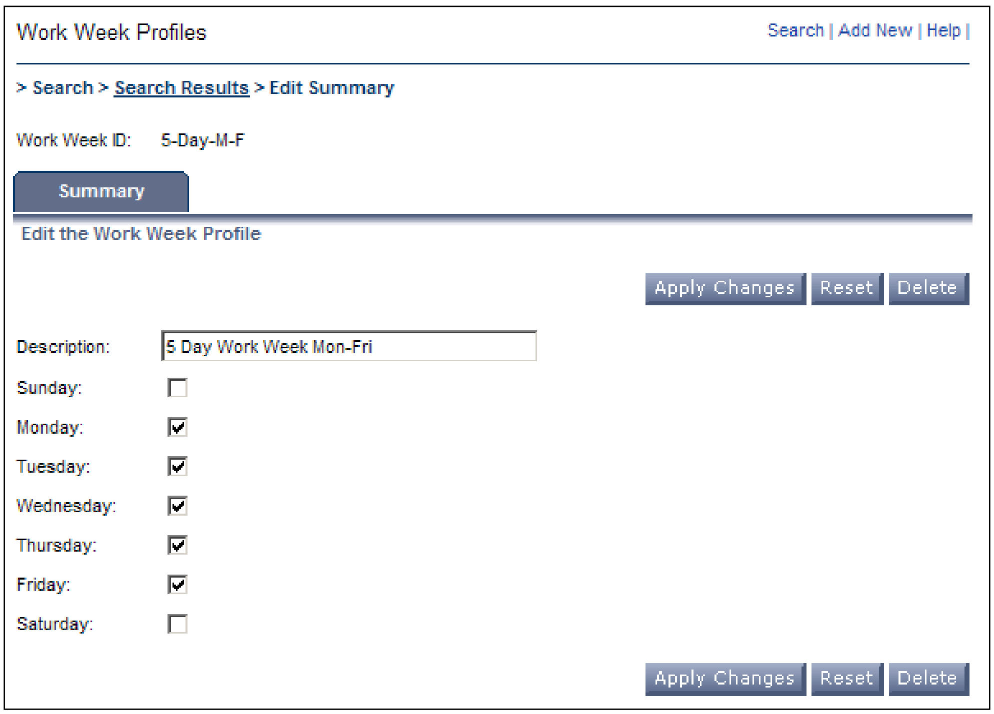

Figure 33. Work Week Profile

NASA Business Rule

When setting up facilities and locations, use upper case with dashes in the following format: CENTER-FACILITY-LOCATION. Facility means building and location means room number (example: GRC-B15-R101). All descriptions shall be entered using a combination of upper and lower case letters. NSTC administrators shall add the center's prefix to all center facility description fields. This rule is also cited in the business rules for **Other Center Training**.

Lab 19. Add a Facility

Step

1. Navigate to **Learning > Resources > Facilities**.
2. Click **Add New**.
3. Enter a facility ID.
4. Enter a description of the facility.
5. Select a domain for the facility.
6. Select a region from the drop-down menu.
7. Select the holiday profile from the drop-down menu.
8. Select the time zone of the facility from the drop-down menu.
9. Select the work week profile from the drop-down menu.
10. Click the **External Facility** checkbox if the facility is external to your organization.
11. Enter any relevant comments.

    Note: *This field is for admin informational purposes only.*

12. Click **Add**.

Locations

The location refers to the room where the training takes place. This record can be identified as internal or external to the organization and can be associated with a facility (building).

When an admin creates a location resource, he/she can determine the maximum capacity for the room (Figure 34). Domain, location type, and facility are all SATERN mandatory fields for locations records.

Note: *The capacity field does not prevent over-enrolling in a room beyond its capacity.*

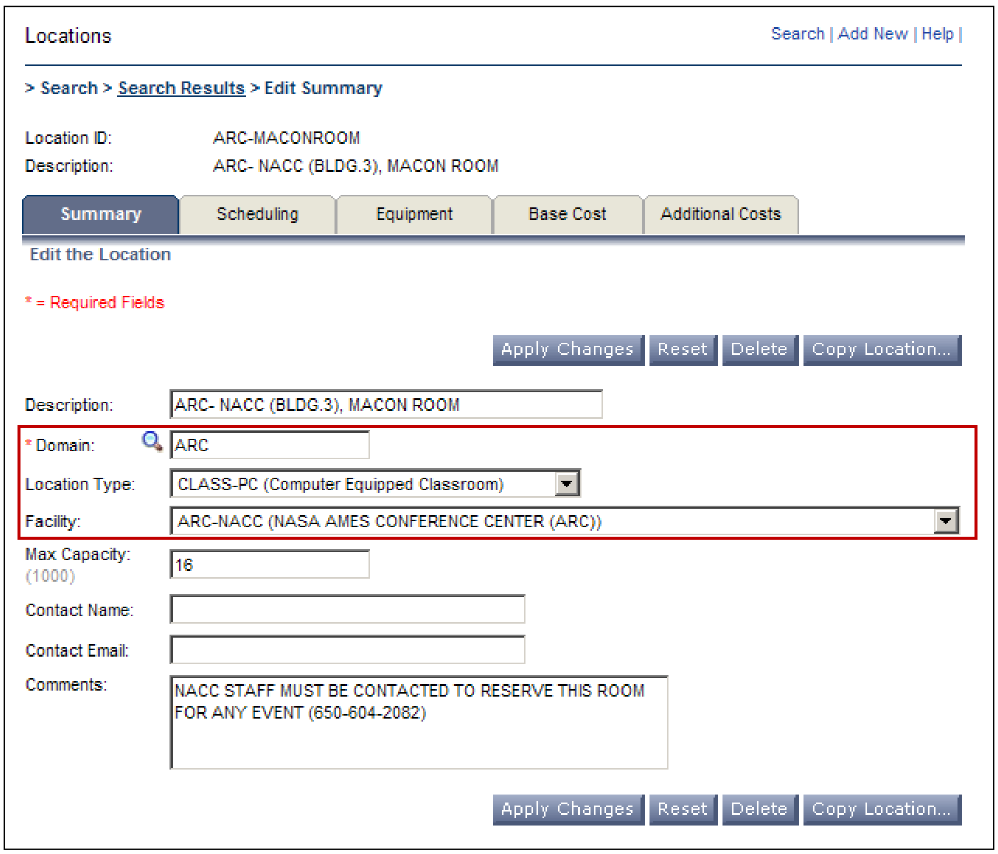

Figure 34. Summary Tab: Location Record

Lab 20. Add a Location

Step

1. Navigate to **Learning > Resources > Locations**.

2. Click **Add New**.

3. Enter a location ID.

4. Enter a description for the location.

5. Select a domain for the location.

6. Select a location type from the drop-down menu.

7. Select the facility associated with the location from the drop-down menu.

8. Enter the maximum capacity for the location.

9. Enter a contact name for the location

10. Enter any relevant comments.

    Note: *This field is for admin informational purposes only.*

11. Click **Add**.

Related Reports

The following are reports in SATERN that relate to resources:

- Facility Data
- Location Data
- Location Utilization
- Instructor Data
- Instructor Proctor Codes
- Equipment Data
- Equipment Status
- Equipment Utilization
- Material Data
- Resource Conflicts
- Holiday Profile
- Region Data

WORKING WITH CLASSES

A class is a grouping of learners who attend scheduled offerings as a group. A class is created for a specific period of time with a start date and an end date. Learners who cannot or do not stay current with their class can be moved to another class or removed all together.

For example, a group of employees are identified as a class and go through a series of management training courses together, or a group of new hire electricians all take the same basic series of courses as a class before being split off into their respective specialty areas.

Adding a Class

When the need for a class is identified, the admin creates a class record in SATERN and can assign a curriculum to the class. Once a learner is added to this class, the items in the assigned curriculum display on his/her individual Learning Plan. If a learner is removed from the class, the curriculum is no longer assigned to him/her; however, any item in the learner's Learning History is not affected.

Note: *Class IDs shall be prefixed with the center's or discipline's acronym (i.e., GRC-, JSC-, KSC). If there is a need to have additional spaces in the ID, only dashes should be used; for example, the class ID of a 2009 Foundations of Leadership Class at Kennedy Space Center would be: KSC-FOL09.*

Main Class Fields

When an admin is creating a class, he/she should populate some key fields if the information is available. SATERN required fields are indicated with a red asterisk (*) on the screen.

- **Curriculum:** The curricula entered in this field are assigned to all learners in the class. This provides another method to have curricula automatically assigned to learners. If a learner is removed from the class, the curricula are no longer assigned to him/her.

- **Start/End Dates:** Indicates to administrators when a class is scheduled to begin and end. If an administrator attempts to register the class for a scheduled offering outside this date range, he/she receives a warning message.

Lab 21. Adding a Class

Step

1. Navigate to **Learning > Classes**.
2. Click **Add New**.
3. Enter a class ID.
4. Enter a description for the class.
5. Select a domain for the class.
6. Select a curriculum, if applicable.
7. Enter the maximum size (number of learners) for the class.
8. Enter a start date.
9. Enter an end date.
10. Click **Add**.

Learners Tab

The Learners tab of the class record allows the admin to add learners to the class. The admin can also assign a status code, move a learner to another class, or enter comments for individual learners (Figure 35).

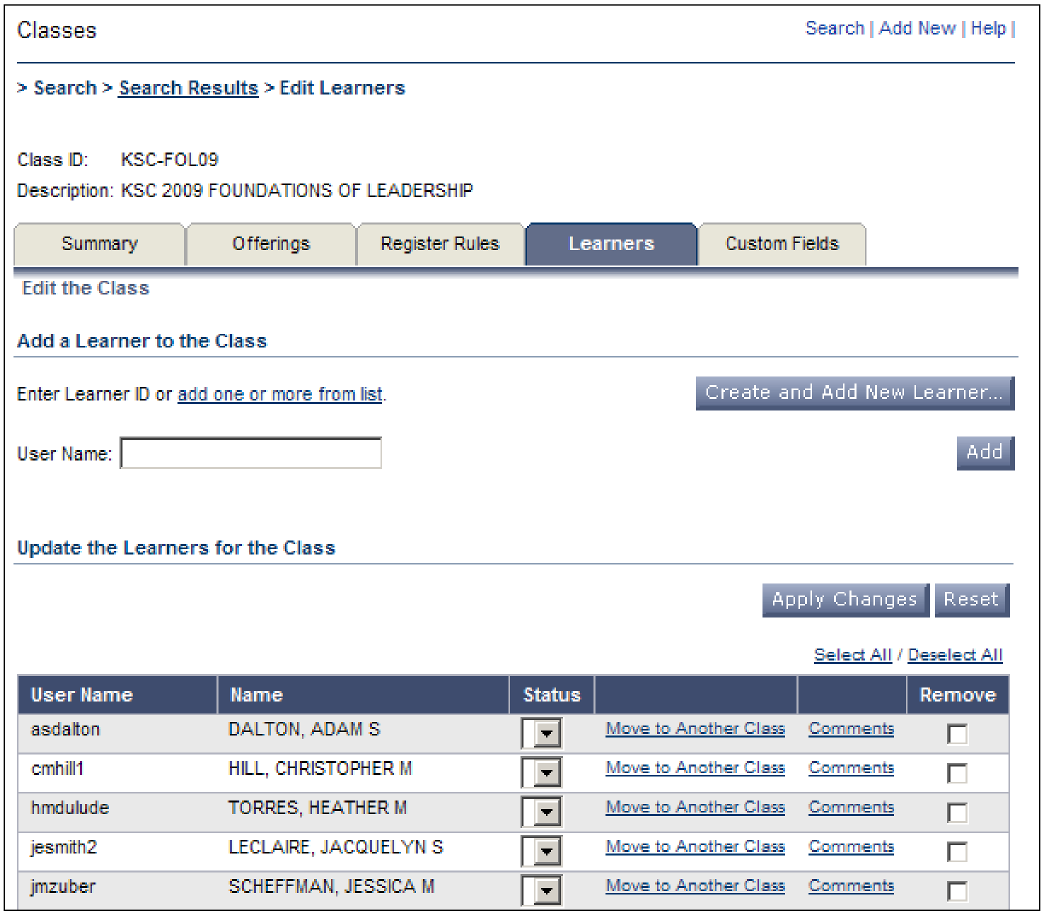

Figure 35. Learners Tab: Class Record

Register Rules Tab

The Register Rules tab allows the admin to set the default registration status for learners automatically registered in scheduled offerings associated with the class. The admin may also set whether the learner is to fill an organization's slot in a scheduled offering, if there are slots reserved. This tab is also where the notification rules are checked for e-mail delivery upon registration for a scheduled offering (Figure 36).

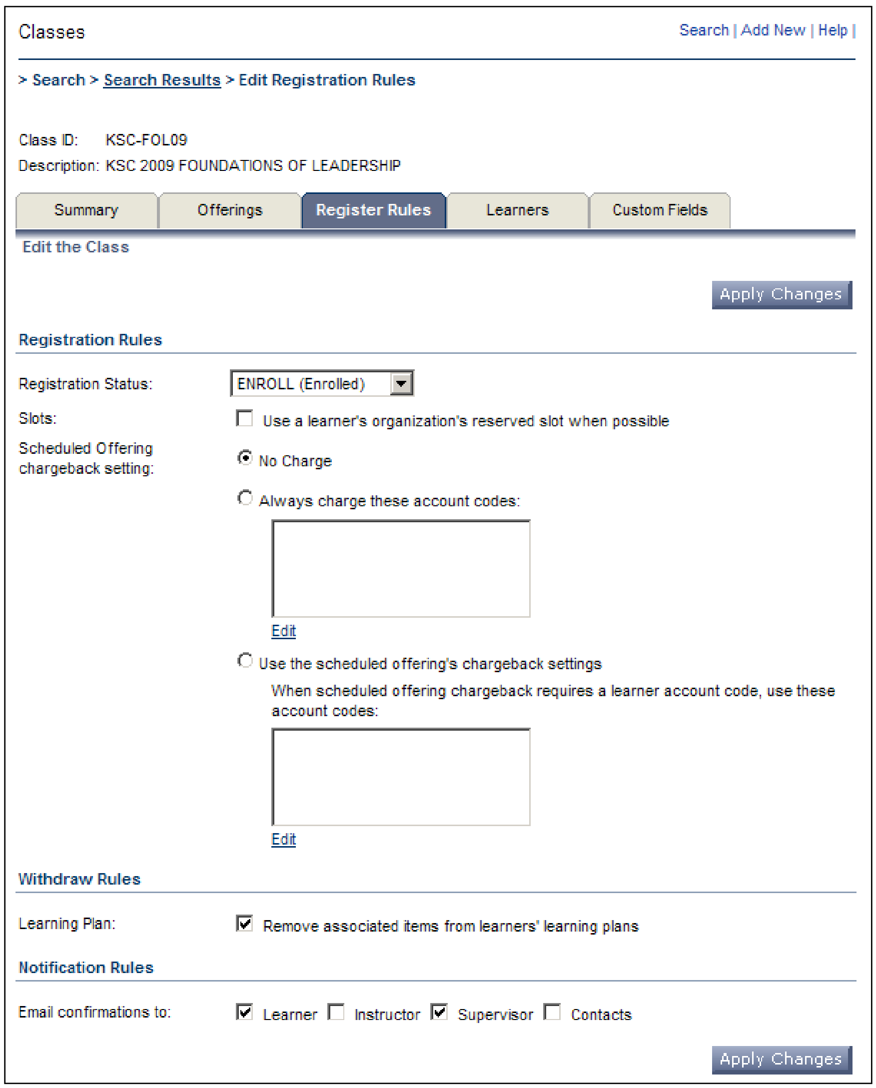

Figure 36. Registration Rules Tab: Class Record

Offerings Tab

The Offerings tab allows the admin to add an existing scheduled offering to the class and auto register learners. Any learners added to the class later are also registered in the scheduled offerings listed. If the notification rules have been checked to deliver e-mails, the learner and his/her supervisor will receive e-mail notifying them of the registration (Figure 37).

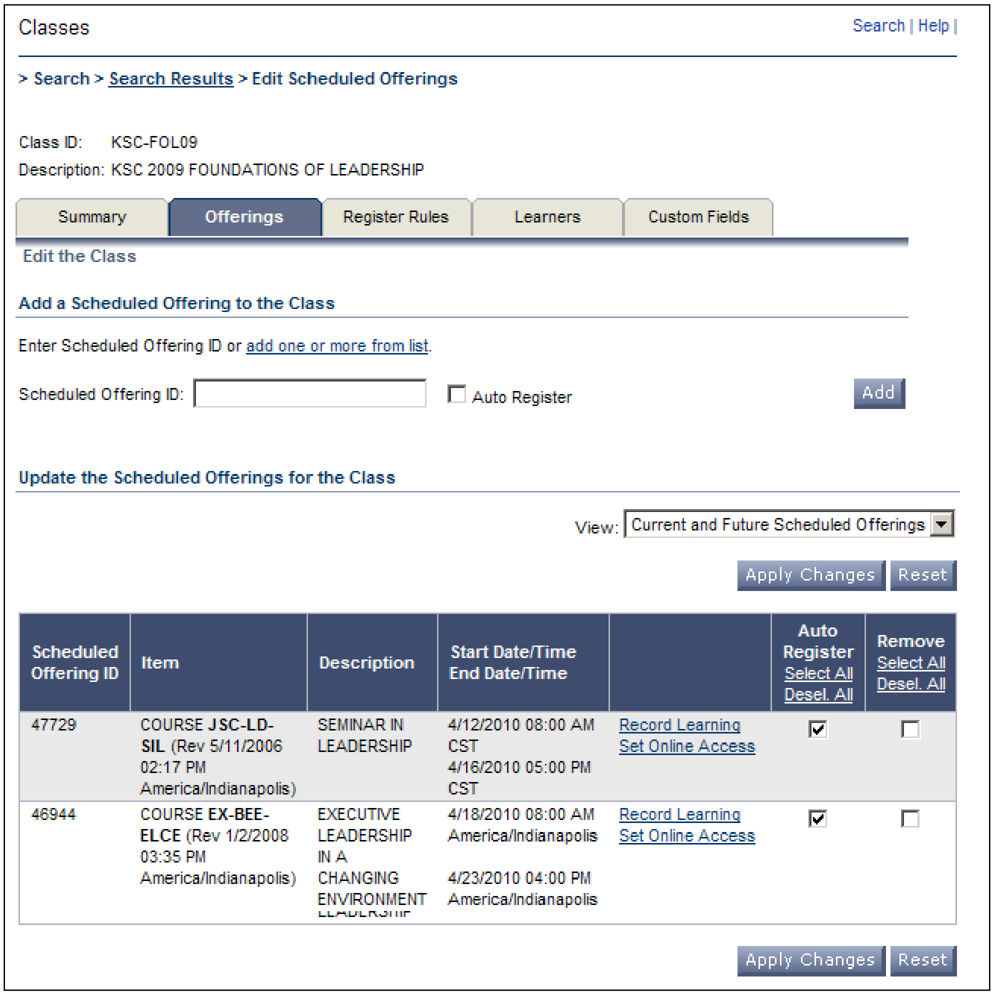

Figure 37. Offerings Tab: Class Record

Lab 22. Setting up a Class

Add Learners to the Class

Step

1. Access in edit mode the class created in Lab 18.
2. Select the **Learners** tab.
3. Click **add one or more from list**.
4. Enter search criteria to search for learners to be added to the class.
5. Click **Search**.
6. Click the **Select** checkbox next to all learners to add to the class.
7. Click **Add**.
8. Verify that all selected learners are part of the class.

Set Registration Rules for the Class

Step

1. Select the **Register Rules** tab.
2. Select the **Registration Status** from the drop-down menu.
3. Click the **No charge** radio button.
4. Uncheck the **Learning Plan** checkbox in the *Withdraw Rules* section.
5. Check all **notification** checkboxes in the *Notification Rules* section.
6. Click **Apply Changes**.

Add Scheduled Offerings to the Class

Step

1. Select the **Offerings** tab.

2. Click **add one or more from list**.

3. Enter search criteria to search for the scheduled offering you want to add to the class.

4. Click **Search**.

5. Select the **Auto Register** and **Add** checkboxes next to each offering you want to add to the class.

6. Click the **Add** button.

RELATED REPORTS

The following are reports in SATERN that relate classes:

- Class Data

  The Class Data report describes a class, including the learning items, curricula, and offerings associated with the class, the learners in the class, and other class attributes.

- Class Location

  The Class Location report returns the locations associated with a class, such as the location of scheduled offerings associated with a class.

- Class Progress

  The Class Progress report returns the progress of learners in a class toward completion of the class's learning.